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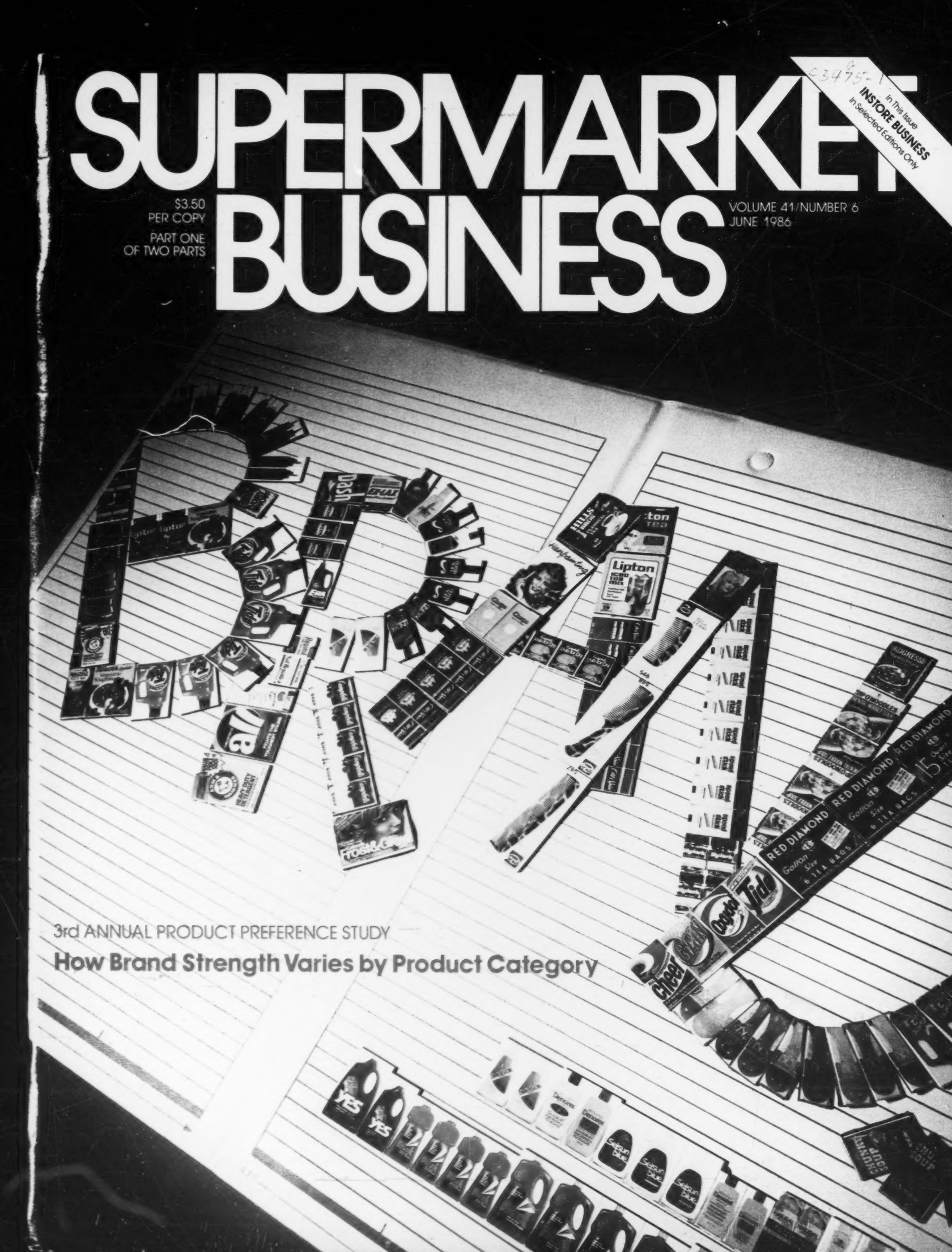

3rd ANNUAL PRODUCT PREFERENCE STUDY

How Brand Strength Varies by Product Category

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SUPERMARKET BUSINESS

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THIRD ANNUAL PRODUCT PREFERENCE STUDY: BRANDS—HOW STRENGTH VARIES BY PRODUCT CATEGORY/ROBERT DIETRICH 19

A first-time look at the individual brand concentration profiles of 330 product categories yields new data that are both instructive and actionable. Knowing the percent of product volume accounted for by the number one, two and three brands—as well as the number of brands needed to attain the various percent-of-sales goals—is a useful supplement to intuition and experience. First-time data on brand loyalty can also help.

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KEVIN COUPE

Jim Stoll was facing declining business and a mid-life crisis. He decided, though, to turn himself around. He closed his stores that weren't performing, and opened a new warehouse-style operation: Bag-n-Save. Fourth in a series.

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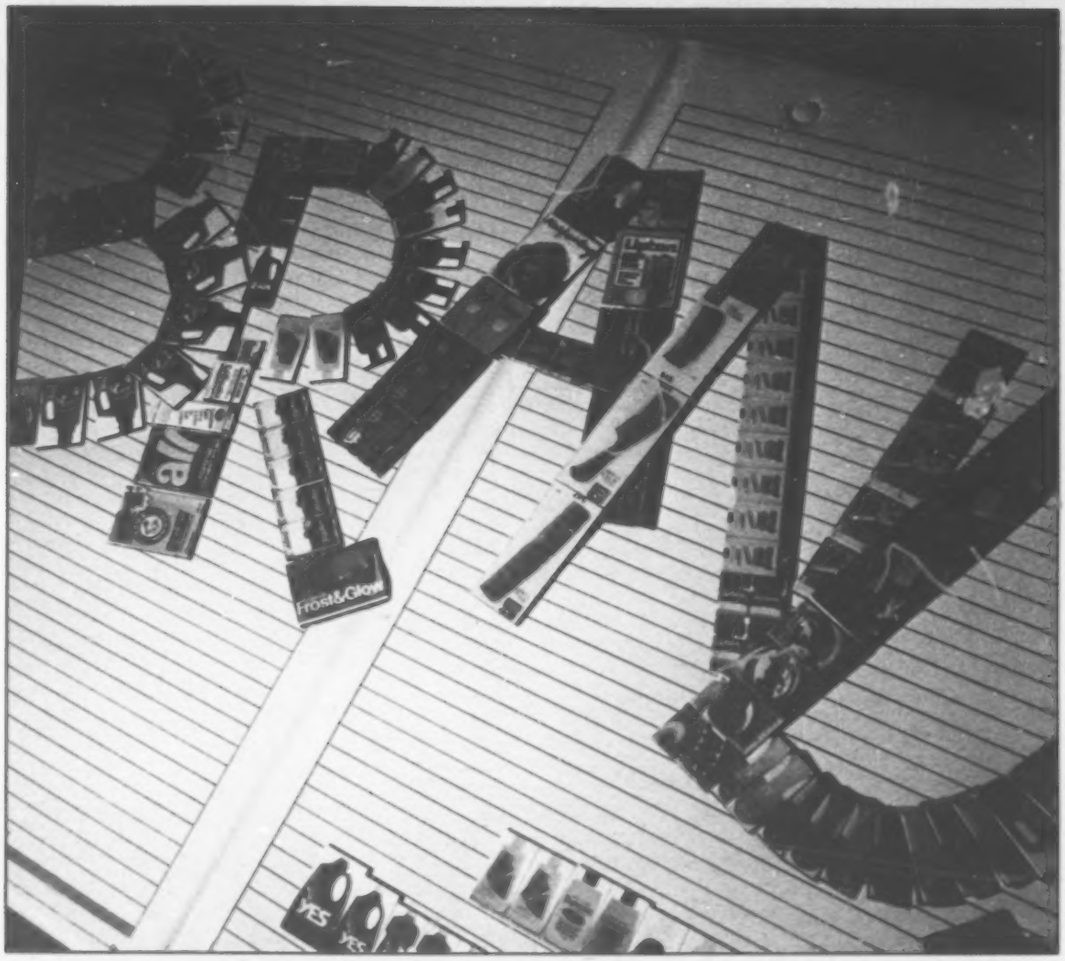

THIRD ANNUAL PRODUCT PREFERENCE STUDY

B·R·A·N·D·S

HOW STRENGTH VARIES BY PRODUCT CATEGORY

This special report presents exclusive new data to help you determine that for over 300 product categories.

PREPARED BY ROBERT DIETRICH

Thumbs up? Or thumbs down? Every day warehouse executives and store managers wield life-or-death power over the fate of brands.

Often with little more input than experience and intuition (valuable but insufficient tools), decisions are made to authorize adding a seventh brand of widgets or to guillotine that fifth brand of geegaws.

But still the question nags: how many brands are enough? Too few? Too many? This report will help you find the answers.

Ironically, the problem of worrying how many brands should be given shelf space comes at a time when new stores are often two to three times the size of those they replace. But chances are that many venerable packaged goods categories have not gained much more linear shelf space—let alone *share* of total store space—in today's stadium-sized stores vis-a-vis yesterday's peewees.

That extra space, you see, is needed for lobster tanks, pizza-making stations, video rental installations, and patio furniture in and outs.

Following the pattern

The "how-many-brands" query has as many answers as there are product categories (330 in this report), each with its unique *brand concentration* fingerprints. But in looking at data on the percent of unit consumption accounted for by leading brands, as developed in nationally projectable syndicated studies conducted by Mediamark Research Inc., two distinct patterns assert themselves:

The Heavy Hitters—The #1 Brand often enjoys a toothsome 50 percent or more share of sales. And adding #2 and/or #3 often rockets share of

sales over 90 percent.

The Diffusers—Brand shares of sales descend like a long flight of steps, with even #1 of modest size, and each succeeding step shrinking only slightly in size.

While decisions must be reached in the context of *product categories* (e.g. English muffins) rather than *product classes* (e.g. baked goods, of which English muffins is one element), the chart on page 22 illustrates the magnitude of the difference in brand concentration between Baby Food (whose #1 Brand accounts for 54.5 percent of sales, with the top three brands registering 89.4 percent) and bottom-of-the-list Men's Hair Care (only 16.0 percent for #1 and 31.7 when #2 and #3 are added).

(NOTE: Only national brands are included in the figures in this report, due to erratic variations in private label and generic sales from region to region. Readers should, of course, continue to allocate space within categories to private label and generics in accordance with sales history.)

Just one more?

Decisions on brands must be made "incrementally"—that is, by asking: If Brand #X is added, how much more of potential sales will be realized, and against what incremental dedication of shelf space, manpower and other resources?

In other words, once you ascertain that stocking, say, the #3 brand will elevate you to satisfying a higher, measurable level of potential sales, then you have the ammunition to choose between two alternatives:

(a) Yes, I really believe that difference is important so I'll stock #3, or

(b) The difference isn't big enough to make a significant difference, so I'd be better off giving more space to #1 or #2, or perhaps giving the space over to some other, perilously squeezed category.

So many brands, so little space

Looking at the rank listing of brands that contribute to sales in Diffuser-type categories, we find some lists that grow into dozens of brands, with each incremental brand adding only a fraction of a percent.

At what point in the list should the knife fall? To provide a pragmatic framework for making such a decision, the Mediamark data has been arranged to show how many brands would be needed to satisfy each of four sales goals.

Once you've decided on the level of your *percent goal*, you'll be able to look at a category such as Barsoaps for Personal Use and know the number of brands you need to carry:

50% ..... 5 brands
67% ..... 8 brands
75%..... 10 brands
90%..... 16 brands

(This example contrasts with a category like Scouring Powder, where only two brands will satisfy 75 percent of demand, and three brands cover 90 percent.)

Loyalty tests

While selecting a percent-of-demand goal may seem somewhat arbitrary, it can become somewhat less so by taking brand loyalty into consideration. While brand loyalty is too often measured by what consumers *say* they do, new statistics are presented here that show what consumers actually do. For each category the percent of total users who are One-Brand Users is indicated. (NOTE: The One-Brand statistics were specially developed by Mediamark for this report.)

A relatively low percentage of one-brand users is likely to reflect the fact that many brands are offered in the category and that users are often swayed by the latest coupon or other price-cutting promotion. In such instances there is less pressure to please all the people all the time.

But when One-Brand Users dominate a category (as is often the case with personal care products), consideration should be given to stocking as many brands as possible to satisfy these loyalists.

Brand news

As new brands are introduced, and others reach more mature phases of their life cycle, constant reevaluation of brand authorization is needed. The statistics in this report are intended to augment, not supplement, the judgment brought to bear on that process.

HOW TO READ THE TABLES

For each product category, the demographic base used is the one that accounts for most of its sales. For most food categories, as well as dry grocery non-foods categories like the sample shown here, the base is FEMALE HOMEMAKERS. The other base groups used in this report are ADULTS (for categories including Tobacco, Wine and HBA used by both sexes) and MEN and WOMEN, matched to their appropriate specialized HBA product usage.

The individual sub-categories are listed in alphabetical order, rather than being ranked numerically. The nomenclature used is comparable to standard supermarket trade descriptions.

While decisions must be based on sub-categories (i.e. on Scouring Powder rather than on Household Cleaners) the averages are shown to facilitate intra-category comparisons and to provide a perspective for department-to-department across-the-store comparisons. The master chart (page 22) ranks all 36 categories by the degree of penetration achieved by the three leading brands.

Participants in the Mediamark study are asked the quantities they purchase of each brand over a set perio.d (often the previous six months). Using these data, special MRI computer programs "weight" the brand share of volume that is accounted for by each brand to derive its percent of sales. For the first sub-category shown here, for example, the #1 brand accounts for 32.0 percent of sales. By adding the #2 brand (15.0 percent), 47.0 percent of sales is covered; and by then adding the #3 brand (12.9 percent) the CUM- (short for CUMULATIVE) percent of sales that's covered rises to 59.9 percent. In a product class like Household Cleaners, the proportion of sales accounted for by the top three brands varies from a low of 36.0 percent (Household Cleaners) to a high of 90.4 percent (Scouring Powder).

HOUSEHOLD CLEANERS	SHARE	CUM-	NO. OF BRANDS NEEDED TO REACH % OF SALES GOAL				ONE-BRAND USERS (% of Total Users)
	#1	#2	#3	50%	67%	75%	90%	
Carpet/Rug Cleaners	32.0	15.0	12.9	3	4	6	12	75.5
		47.0	59.9					
Drain Cleaners	31.6	29.1	25.1	2	3	3	5	86.1
		60.7	85.8					
Room Deodorizers								
			81.0					
Scouring Powder	38.1	27.0	5.3	1	2	2	3	79.3
		65.1	90.4					
AVERAGE	33.9	38.1	12.8					71.3
		54.0	66.8					

In making a decision on how many brands to stock, it is valuable to know the degree of brand loyalty that supports various product categories. As an indicator of brand loyalty, one-brand users have been separated from multiple-brand (two or more) users. So of female homemakers who purchase Carpet/Rug Cleaners 75.5 percent report the purchase of only one brand, while the remaining 24.5 percent report two or more brands. Categories with heavy promotional activity, including coupons and an above-average velocity of new product introductions frequently tend to have a below-average incidence of one-brand users.

To relate brand concentration patterns to the problems that store and warehouse personnel have in deciding **how many brands is enough**, this part of the table allows an unique (and first-time) look at the number of brands that must be carried to achieve a goal of a certain percent of sales. The four levels shown are one-half (50 percent); two-thirds (67 percent); three-quarters (75 percent); and nine-tenths (90 percent). In the case of Carpet/Rug Cleaners, three brands (at 59.9 percent) would satisfy the 50% goal. Adding the 9.5 percent registered by the fourth ranked brand (not shown) raises the cumulative to 69.4 percent, thereby satisfying a 67% goal. Then adding in the fifth and sixth ranking brands, with sales of 5.2 percent and 4.0 percent respectively, caps 78.6 percent of sales, enough to meet a 75% goal. With each additional brand beyond the sixth adding quite small increments in sales in the case of Carpet/Rug Cleaners, it would be necessary to add the seventh through twelfth ranking brands to satisfy 90 percent of sales. The figures in themselves do not decide the how-many-brands-is-enough question, but rather give the grocery executive emperical data on which a decision can be rationali .ached.

GETTING THE NUMBER OF BRANDS RIGHT— HOW TO USE THIS REPORT

When it's time to decide how many brands to stock in a given product category—be it light bulbs or light beer—a mistake in the direction of either shortfall or overkill can be damaging.

The price for stocking too many brands is paid in space, time and dollars. Space, both in terms of warehouse slots and store shelving, is misallocated when an "unnecessary" brand is allowed to usurp it from either (1) a leading brand in the same category which is being squeezed into too little space, or (2) from another product category that has been shortchanged on space.

Time is wasted both in unnecessary ordering and restocking. And money is wasted by underutilizing inventory dollars.

On the other hand, failure to authorize that critical extra brand can also be costly. In categories with high concentration among leading brands, you may have to look to, say, Brand #4 or Brand #5 to raise the percent of demand your brand mix satisfies up to an acceptable (67%, 75%, 90%) level.

Further, for brands with an above average incidence of one-brand users, it's important not to turn off brand-loyalists and drive them into the checkout lanes of your competitors.

To help avoid the excesses of stocking either too many or too few brands, here are some questions to ask yourself when comparing the number of brands you stock with what the figures in this report show:

Are the #1 and/or #2 and/or #3 brands powerhouses with muscular market shares? If yes, make sure they're given enough shelf space to preclude too frequent out-of-stocks. When line extensions within these brands are introduced, listen with a receptive ear. When you receive notice that these brands are being featured in coupon promotions, stock up so that your customers aren't disappointed. And don't forget that shoppers like to see fast-friend brands in your advertised specials and end-aisle displays.

Are there some further-down-the-brand-share-line favorites that I've been unjustly ignoring? A sure sign of this is categories where an above-average number of brands is needed to meet given percent-of-sales goals. This is a sure indication that follow-behind-the-leader brands have carved out their own franchises among consumers, and that should be respected by allocating them some of the category's shelf space, even if it means cutting back on space occupied by the leaders.

How do my private label and generic items fit into the picture? Because of wide variation of penetration of private label and generics due to variations in their strength from company to company and region to region, they're omitted from this report (although included in detailed Mediamark reports to subscribers). Based on your observations of the strength of these lines—by category—you can dovetail them into the decisions you make on the number of brands you carry based on the figures in this report.

When are brands stronger than their share figures make them look, and what should be done about them? The strongest brands, whatever their actual share size, are those with the highest brand loyalty. This is reflected by the proportion of one-brand users they command. One-brand users are more likely than multi-brand users to expect to find their favorite on your shelves, even if its low overall market share seems to dictate a modest—or minus—number of facings. After too many frustrations the one-branders might just decide, "This store never has anything I want."

The Mediamark Databank— A Microcosm of American Consumers

"What we have here," says Alain Tessier, president of Mediamark Research Inc., "is simply the most accurate representation of the U.S. population possible."

The design and feeding of a databank that contains consumption patterns for 450 product categories, 1,900 product types and 5,700 individual brands is far from simple, however.

Every year 20,000 adults are interviewed in two waves of 10,000 each. The 2,400 "clusters" in which they live are scientifically selected to assure the projectability of the data gathered. Mediamark reports are issued every spring and fall to keep information current.

Who uses the data, which in addition to product usage, cover magazines, radio, broadcast and cable TV habits—all, of course, cross-ruffed against myriad demographic characteristics?

The answer covers a galaxy of subscribers including advertising agencies, advertisers (including many faces well known in supermarket aisles such as Campbell Soup, General Foods, Kraft and Ralston-Purina), magazines and broadcast networks and stations.

While the shelf-long, 20-volume reports published annually by Mediamark seem almost exhaustively comprehensive, the data available from the data bank explode in size geometrically through the use of Mediamark's new on-site, PC-based computer system called MEMRI™ (Micro Evaluation by Mediamark Research Inc.). Complex equations for comparing reach and frequency of various advertising vehicles against target product user groups can be solved in seconds.

Mediamark also offers several customized services that are especially useful in today's "niche" marketing environment:

☐ Ten Mediamarket Reports detail consumer habits in New York, Los Angeles and eight other important markets. Special questions yield data on which supermarkets are shopped.

☐ The Business-to-Business Report identifies who the business purchasers are, what kind of companies they work for, how much of the company's money they spend and what they spend it on. Among the many business products covered are advertising, various types of equipment and supplies, and travel arrangements.

☐ The Upper Deck Report provides insight to marketers trying to influence that top 10 percent of American households with income above $50,000 per year.

☐ The Consumer Innovators Report focuses on people who are likely to be the first to buy new products in five product groupings, including "food and the kitchen environment."

(For information on Mediamark services, contact Sylvia Cassel, senior vice president administration, Mediamark Research Inc., 341 Madison Ave., N.Y., N.Y. 10017. Tel. 212-599-0444.)

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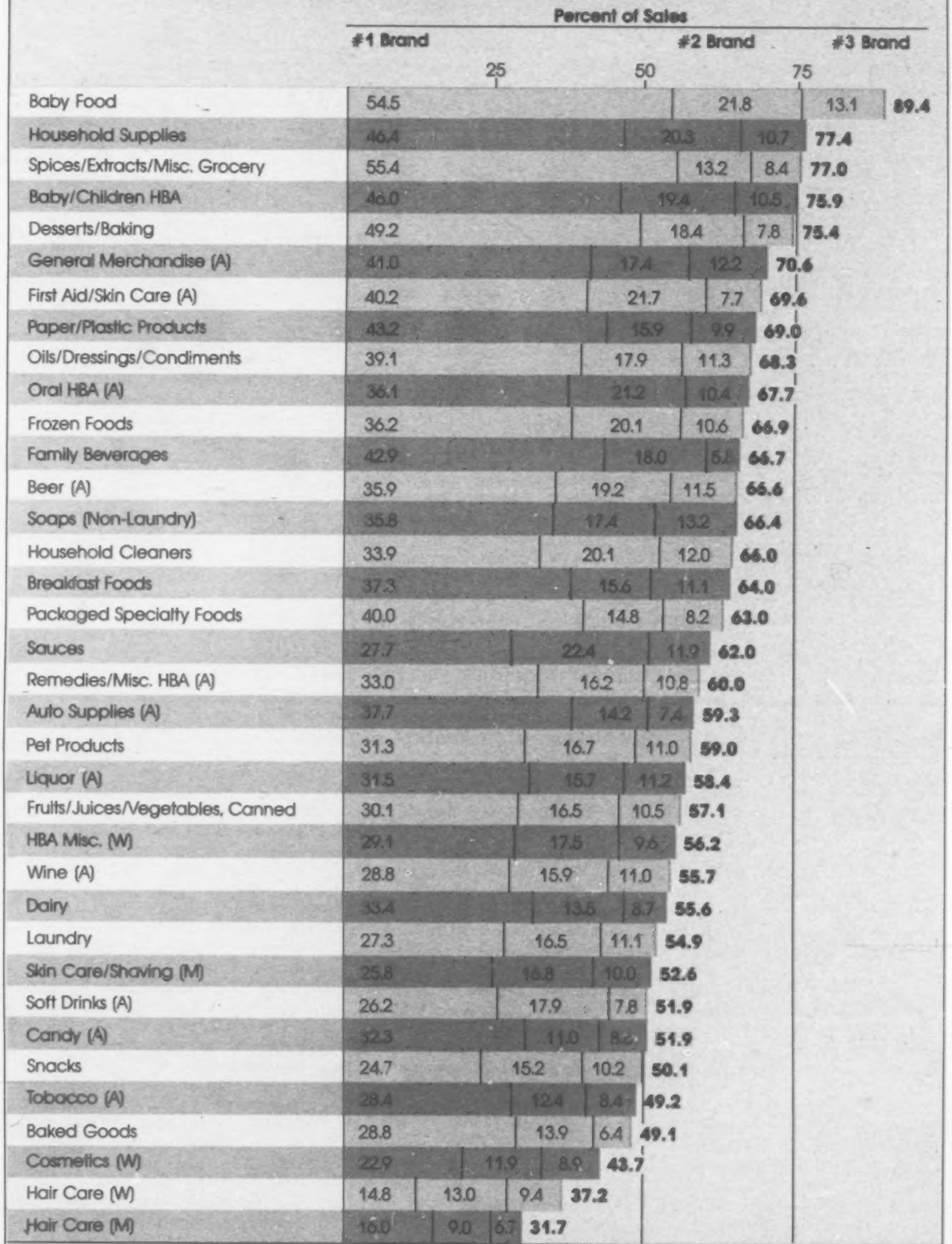
RANKING OF BRAND CONCENTRATION FOR 36 MAJOR PRODUCT CLASSES


Percent of Sales
#1 Brand
#2 Brand
#3 Brand
25
50
75
Baby Food 54.5 21.8 13.1 89.4
Household Supplies 46.4 20.3 10.7 77.4
Spices/Extracts/Misc. Grocery 55.4 13.2 8.4 77.0
Baby/Children HBA 46.0 19.4 10.5 75.9
Desserts/Baking 49.2 18.4 7.8 75.4
General Merchandise (A) 41.0 17.4 12.2 70.6
First Aid/Skin Care (A) 40.2 21.7 7.7 69.6
Paper/Plastic Products 43.2 15.9 9.9 69.0
Oils/Dressings/Condiments 39.1 17.9 11.3 68.3
Oral HBA (A) 36.1 21.2 10.4 67.7
Frozen Foods 36.2 20.1 10.6 66.9
Family Beverages 42.9 18.0 5.8 66.7
Beer (A) 35.9 19.2 11.5 66.6
Soaps (Non-Laundry) 35.8 17.4 13.2 66.4
Household Cleaners 33.9 20.1 12.0 66.0
Breakfast Foods 37.3 15.6 11.1 64.0
Packaged Specialty Foods 40.0 14.8 8.2 63.0
Sauces 27.7 22.4 11.9 62.0
Remedies/Misc. HBA (A) 33.0 16.2 10.8 60.0
Auto Supplies (A) 37.7 14.2 7.4 59.3
Pet Products 31.3 16.7 11.0 59.0
Liquor (A) 31.5 15.7 11.2 58.4
Fruits/Juices/Vegetables, Canned 30.1 16.5 10.5 57.1
HBA Misc. (W) 29.1 17.5 9.6 56.2
Wine (A) 28.8 15.9 11.0 55.7
Dairy 33.4 13.5 8.7 55.6
Laundry 27.3 16.5 11.1 54.9
Skin Care/Shaving (M) 25.8 16.8 10.0 52.6
Soft Drinks (A) 26.2 17.9 7.8 51.9
Candy (A) 32.3 11.0 8.6 51.9
Snacks 24.7 15.2 10.2 50.1
Tobacco (A) 28.4 12.4 8.4 49.2
Baked Goods 28.8 13.9 6.4 49.1
Cosmetics (W) 22.9 11.9 8.9 43.7
Hair Care (W) 14.8 13.0 9.4 37.2
Hair Care (M) 16.0 9.0 6.7 31.7
AVERAGE—ALL CATEGORIES 34.7 16.6 9.9 61.2

Base Groups
(A)—Adults
(M)—Men
(W)—Women
All others are based on Female Homemakers.

The 36 product classes shown here represent averages for 330 individual product categories shown in the tables on the following pages. On average the #1 Brand accounts for 34.7 percent of unit volume, with #2 adding 16.6 percent and #3 9.9 percent. The wide range of brand concentration among product classes can also be found in the product categories within each class.

What "NR" Means

In the part of the tables showing how many brands are needed to achieve each percent-of-sales goal, "NR" signifies "Not Reported." This means that adding together all the brands in the category reported by Mediamark still yields a percentage share **short** of this level. The reason is that the balance of sales are allocated to many smaller brands lumped together as "Other," and to private label and generics.

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WHAT'S IN A BRAND NAME?

MRI questionnaires present respondents with a list of brands for each product, as well as the opportunity to write one in. Several brands in a product category may share the same brand name but are considered to be separate brands if they represent a distinct and identifiable product line. For example, in the rice category the following four products are considered to be *separate brands*: Uncle Ben's Regular; Uncle Ben's Quick; Uncle Ben's Select Brown Rice; and Uncle Ben's Brown Rice. Brands may, of course, be the umbrella for several *items* representing variations in package size, color, flavor or similar variation.

AN EXCERPT FROM THE MRI QUESTIONNAIRE

Volume data are collected for both products *and* brands.

LOW CALORIE DOMESTIC BEER (118)

	You Personally: Drank in last 6 months	Glasses/ last 7 days
TOTAL:	☐	___ 00
KINDS:		
Bottled	☐	___ 01
Canned	☐	___ 02
Draft	☐	___ 03
BRANDS:		
Budweiser Light	☐	___ 04
Coors Light	☐	___ 05
Hamm's Special Light	☐	___ 06
Iron City Light	☐	___ 07
Michelob Light	☐	___ 08
Miller Light	☐	___ 09
Natural Light	☐	___ 10
Old Milwaukee Light	☐	___ 11
Olympia Gold	☐	___ 12
Pabst Extra Light	☐	___ 13
Pearl Light	☐	___ 14
Piel's Lite	☐	___ 15
Ranier Lite	☐	___ 16
Schlitz Light	☐	___ 17
Schmidt's Light	☐	___ 18
Stroh's Light	☐	___ 19
_____	☐	___ 999
OTHER (Write in)		

DRY GROCERY (FOOD)

BABY FOODS

(BASE = FEMALE HOMEMAKERS)	THREE TOP BRANDS (% of sales) #1	#2	SHARE CUM- #3	NO. OF BRANDS NEEDED TO REACH %-OF-SALES GOAL 50%	67%	75%	90%	ONE-BRAND USERS (% of Total Users)
Baby Foods	54.8	19.1 / 73.9	16.7 / 90.6	1	2	3	3	69.1
Infant Cereal	72.9	15.8 / 88.7	9.7 / 98.4	1	1	2	3	87.2
Infant Formulas/Prepared	35.7	30.6 / 66.3	12.9 / 79.2	2	3	3	NR	88.8
AVERAGE	**54.5**	**21.8 / 76.3**	**13.1 / 89.4**					**81.7**

Powerhouse brands dominate the baby foods section of the supermarket. The #1 brand of infant cereal accounts for 72.9 percent of sales, with nine out of 10 female homemaker users saying they only purchase one brand. Beyond the top three brands of prepared infant formula no single brand was prominent enough to be tabulated.

BAKED GOODS

(BASE = FEMALE HOMEMAKERS)	THREE TOP BRANDS (% of sales) #1	#2	SHARE CUM- #3	NO. OF BRANDS NEEDED TO REACH %-OF-SALES GOAL 50%	67%	75%	90%	ONE-BRAND USERS (% of Total Users)
Bread	10.0	4.8 / 14.8	4.5 / 19.3	16	NR	NR	NR	55.0
Bread Crumbs, Coating Mixes	17.4	15.6 / 33.0	8.9 / 41.9	5	8	10	NR	62.9
Cookies, Ready To Eat	14.1	12.0 / 26.1	10.5 / 36.6	5	9	12	NR	49.2
Crackers	15.7	8.5 / 24.2	8.3 / 32.5	6	10	13	NR	48.3
Croutons	57.1	13.0 / 70.1	—	1	2	NR	NR	94.7
English Muffins	41.4	10.7 / 52.1	5.2 / 57.3	2	7	NR	NR	85.1
Snack Cakes	42.2	29.4 / 71.6	8.7 / 80.3	2	2	3	5	67.5
Stuffing Mixes/Products	32.4	17.0 / 49.4	5.4 / 54.8	3	6	9	NR	79.6
AVERAGE	**28.8**	**13.9 / 42.7**	**6.4 / 49.1**					**67.8**

It takes 16 brands of bread to satisfy a 50-percent-of-sales goal. Beyond that the prevalence of strong regional and private label offerings precludes calculating the number of brands necessary to reach a higher goal. Power among cracker brands is quite fragmented, with 13 brands necessary to achieve a 67 percent goal.

In contrast, croutons, English muffins and snack cakes are dominated by very strong #1 brands, with about nine out of 10 consumers using only one brand in those categories. For bread, cookies and crackers, however, purchases are likely to be allocated among more than one brand in half of all households.

BREAKFAST FOODS

(BASE = FEMALE HOMEMAKERS)	THREE TOP BRANDS (% of sales) #1	#2	SHARE CUM- #3	NO. OF BRANDS NEEDED TO REACH %-OF-SALES GOAL 50%	67%	75%	90%	ONE-BRAND USERS (% of Total Users)
Breakfast Cereals, Cold	9.4	8.0 / 17.4	5.5 / 22.9	13	21	27	45	21.5
Breakfast Cereals, Hot	24.3	19.0 / 43.3	11.9 / 55.2	3	5	7	13	57.7
Breakfast/Snack Bars	26.0	20.2 / 46.2	15.6 / 61.8	3	4	5	9	55.1
Toaster Products	67.8	11.4 / 79.2	3.8 / 83.0	1	1	2	NR	83.6
Breakfast Drinks, Powder, Fruit Flavored	83.9	5.9 / 89.8	—	1	1	1	NR	94.2
Syrup	23.0	15.6 / 38.6	13.3 / 51.9	3	5	7	NR	69.1
Pancake, Waffle Mix	38.1	19.8 / 57.9	9.5 / 67.4	2	3	4	NR	80.8
Honey	42.4	10.2 / 52.6	4.0 / 56.6	2	NR	NR	NR	94.4
Jams, Jellies	27.5	17.3 / 44.8	12.2 / 57.0	3	6	NR	NR	71.4
Peanut Butter	30.9	24.2 / 55.1	18.6 / 73.7	2	3	4	NR	79.3
AVERAGE	**37.3**	**15.6 / 52.9**	**11.1 / 64.0**					**70.7**

There's no champion of breakfasts in the cold cereals category, as not even the #1 brand can claim to account for 10 percent of volume. Setting a goal of satisfying 75 percent of projected sales volume means stocking 27 brands, a figure that elevates to 45 brands with a 90 percent goal (a level that is surpassed only by that unique category—cigarettes).

Perhaps reflecting the need to keep several brands in the pantry to satisfy the differing tastes among household members, only one household in five pledges allegiance to only one brand. By contrast, most other categories demand the stocking of only a relative handful of brands to satisfy 75 percent of demand.

NR—Not Reported Source: Mediamark Research Inc.

BRAND SHARE OF CATEGORY

DRY GROCERY (FOOD)

CANDY (BASE = ADULTS)	THREE TOP BRANDS (% of sales) #1	#2 SHARE	#3 CUM-	NO. OF BRANDS NEEDED TO REACH %-OF-SALES GOAL 50%	67%	75%	90%	ONE-BRAND USERS (% of Total Users)
Candy, Individual, Regular Size	13.1	6.8 / 19.9	6.5 / 26.4	8	14	18	35	29.3
Candy, Pkg. of Mini	11.2	8.0 / 19.2	7.9 / 27.1	7	11	14	22	47.7
Candy, Pre-Pkg'd Loose	23.6	13.8 / 37.4	11.0 / 48.4	4	6	9	NR	64.2
Chewing Gum	14.1	13.0 / 27.1	10.4 / 37.5	5	7	9	18	64.0
Cough Drops	49.9	12.2 / 62.1	10.0 / 72.1	2	3	4	8	77.7
Hard Roll Candy	87.8	6.5 / 94.3	2.3 / 96.6	1	1	1	2	95.1
Mints	26.3	16.6 / 42.9	12.0 / 54.9	3	5	5	8	73.6
AVERAGE	**32.3**	**11.0 / 43.3**	**8.6 / 51.9**					**64.5**

Candy shows less concentration among the leading three brands than any food category with the exceptions of snacks and baked goods. For individual regular-size candy (a classification that includes chocolate bars along with other checkout favorites), the Mediamark tabulations break out 68 brands, many with only a scant share of total sales.

One-brand users are few here, with seven out of 10 naming more than one brand. The opposite side of the candy wrapper is represented by cough drops and hard roll candy, both of which have strong leading brands.

DESSERTS/BAKING INGREDIENTS (BASE = FEMALE HOMEMAKERS)	THREE TOP BRANDS (% of sales) #1	#2 SHARE	#3 CUM-	NO. OF BRANDS NEEDED TO REACH %-OF-SALES GOAL 50%	67%	75%	90%	ONE-BRAND USERS (% of Total Users)
Artificial Sweeteners	50.7	32.9 / 83.6	5.1 / 88.7	1	2	2	4	87.0
Baking Chips	57.9	21.0 / 78.9	6.7 / 85.6	1	2	2	NR	81.0
Baking Chocolate, Bar	46.2	28.8 / 75.0	15.3 / 90.3	2	2	2	3	83.9
Baking Coconut	75.0	5.8 / 80.8	5.6 / 86.4	1	1	1	NR	94.4
Baking Mixes	35.0	22.9 / 57.9	11.0 / 68.9	2	3	4	NR	67.4
Brownie/Cookie Mixes	34.5	20.0 / 54.5	8.2 / 62.7	2	4	5	12	67.7
Cake Mixes, Dry	50.2	20.8 / 71.0	7.1 / 78.1	1	2	3	7	53.2
Evaporated Milk	40.7	19.8 / 60.5	6.5 / 67.0	2	3	NR	NR	83.4
Flavored Gelatin Desserts	68.4	12.9 / 81.3	9.7 / 91.0	1	1	2	3	73.5
Flour	46.0	22.1 / 68.1	5.2 / 73.3	2	2	4	NR	85.9
Frosting/Frosting Mixes	32.3	20.8 / 53.1	12.8 / 65.9	2	4	5	6	72.5
Molasses & Syrup	23.0	15.6 / 38.6	13.3 / 51.9	3	5	7	NR	69.1
Pie Filling, Puddings	58.8	10.3 / 69.1	7.3 / 76.4	1	2	3	8	74.2
Pizza Mix	46.8	14.5 / 61.3	11.2 / 72.5	2	3	4	6	80.5
Shortening	79.9	1.5 / 81.4	.5 / 81.9	1	1	1	NR	94.5
Sugar	25.7	18.0 / 43.7	7.2 / 50.9	3	9	NR	NR	69.7
Whipped Topping	41.6	19.5 / 61.1	8.3 / 69.4	2	3	4	10	69.2
Yeast	72.9	24.7 / 97.6	—	1	1	2	2	86.6
AVERAGE	**49.2**	**18.4 / 67.6**	**7.8 / 75.4**					**77.4**

Few grocers would have much trouble guessing the categories with the highest #1 brand share among desserts and baking ingredients—baking coconut, shortening, flavored gelatin desserts and yeast. In all these cases #1 necessarily far outshadows #2 and #3.

With such strongly entrenched brands, it's no surprise that these categories also have above-average incidence of one-brand users. Only somewhat diluted, this pattern of power brands extends to many other categories here, including baking chips, artificial sweeteners, pie fillings and puddings, and dry cake mixes (all with #1 brands over 50 percent).

While few buyers would want to limit their stores' offerings in these categories to only one or two brands, the lessons for space allocation and merchandising emphasis are self-evident.

NR—Not Reported Source: Mediamark Research Inc.

DRY GROCERY (FOOD)

FRUITS/JUICES/VEGETABLES, CANNED	THREE TOP BRANDS (% of sales)			NO. OF BRANDS NEEDED TO REACH %-OF-SALES GOAL				ONE-BRAND USERS (% of Total Users)
(BASE = FEMALE HOMEMAKERS)	#1	#2	#3	50%	67%	75%	90%	
Fruit, Canned/Jarred	34.8	13.6 / 48.4	11.3 / 59.7	3	5	7	NR	46.9
Fruit Juices/Drinks Canned	10.0	9.1 / 19.1	8.2 / 27.3	7	14	19	NR	47.4
Grapefruit Juice, Canned	19.1	15.0 / 34.1	14.0 / 48.1	4	5	NR	NR	89.3
Tomato/Veg. Juices Canned	52.0	11.8 / 63.8	6.7 / 70.5	1	3	4	NR	74.1
Beans, Prep, In A Sauce, Canned	33.1	26.9 / 60.0	11.4 / 71.4	2	3	4	9	68.6
Mushrooms, Canned/Jarred	22.7	18.3 / 41.0	17.9 / 58.9	3	NR	NR	NR	79.1
Tomatoes, Canned	43.4	19.0 / 62.4	6.7 / 69.1	2	3	NR	NR	65.3
Vegetables, Canned/Jarred	25.7	18.4 / 44.1	7.7 / 51.8	3	9	17	NR	39.3
AVERAGE	**30.1**	**16.5 / 46.6**	**10.5 / 57.1**					**63.8**

The problem of how many brands to stock is, not unexpectedly, most difficult in the cases of canned fruit juices and drinks, and canned and jarred vegetables. As cooks gathering materials for a recipe will hardly regard a brand of canned artichoke as an acceptable substitute for a brand of sauerkraut, it pays to study the scanning records of various lines and excise brands only if there is minimum danger of inadvertently excising customers in the same stroke.

OILS/DRESSINGS/CONDIMENTS	THREE TOP BRANDS (% of sales)			NO. OF BRANDS NEEDED TO REACH %-OF-SALES GOAL				ONE-BRAND USERS (% of Total Users)
(BASE = FEMALE HOMEMAKERS)	#1	#2	#3	50%	67%	75%	90%	
Catsup	51.9	22.2 / 74.1	12.3 / 86.4	1	2	3	NR	79.3
Mayonnaise/Mayo Type Dressing	33.0	19.4 / 52.4	17.7 / 70.1	2	3	4	9	73.7
Mustard	47.2	11.1 / 58.3	9.4 / 67.7	2	3	4	NR	78.9
Oil, Salad or Cooking	30.4	18.1 / 48.5	15.9 / 64.4	3	4	6	NR	72.4
Pickles	33.4	15.0 / 48.4	11.9 / 60.3	3	4	7	NR	73.1
Pickle Relish	51.4	27.6 / 79.0	1.8 / 80.8	1	2	2	NR	89.8
Salad Dressing	26.5	11.7 / 38.2	10.3 / 48.5	4	6	7	18	49.2
AVERAGE	**39.1**	**17.9 / 57.0**	**11.3 / 68.3**					**73.8**

Strong leading brands set the pace for most of these categories, as the top three brands account for an above-average 68.3 percent of sales. For both catsup and pickle relish the #1 brand can be counted on for over 50 percent of sales, with the cumulative share for the top three brands at over 80 percent. Only about one-quarter of mayonnaise users spread their purchases over more than one brand, suggesting that heavy merchandising of this product may have more influence on store loyalty than on brand loyalty.

PACKAGED SPECIALTY FOODS	THREE TOP BRANDS (% of sales)			NO. OF BRANDS NEEDED TO REACH %-OF-SALES GOAL				ONE-BRAND USERS (% of Total Users)
(BASE = FEMALE HOMEMAKERS)	#1	#2	#3	50%	67%	75%	90%	
Bacon & Breakfast Strips	16.1	9.9 / 26.0	7.9 / 33.9	7	15	21	NR	70.7
Chicken, Canned	91.9	—	—	1	1	1	1	97.3
Chili, Canned	48.9	19.3 / 68.2	9.0 / 77.2	2	2	3	NR	83.3
Cold Cuts	24.8	6.7 / 31.5	6.4 / 37.9	6	16	NR	NR	63.1
Dinner Mixes, Pkg'd.	66.1	7.6 / 73.7	6.4 / 80.1	1	2	3	6	66.8
Deviled Ham & Other Meat Products	25.4	17.0 / 42.4	16.2 / 58.6	3	4	5	7	69.6
Flavored & Seasoned Rice Mix	38.3	10.9 / 49.2	10.5 / 59.7	3	4	5	9	72.2
Frankfurters/Wieners	20.3	6.8 / 27.1	6.7 / 33.8	8	16	25	NR	69.5
Ham, Canned	22.1	11.9 / 34.0	10.7 / 44.7	4	7	9	NR	82.6

The 22 products included here represent much of the heart of the dry grocery department, with many standards that are frequently found on shopping lists. In the important canned soup category (a billion dollar seller in supermarkets), the top three "brands," accounting for 83.2 percent of sales, are all produced by the same company but targeted for different uses. The smaller canned chicken and canned stews categories both find one company with over a 90 percent share.

NR—Not Reported Source: Mediamark Research Inc.

DRY GROCERY (FOOD)

PACKAGED SPECIALTY FOODS
Continued

(BASE = FEMALE HOMEMAKERS)	THREE TOP BRANDS (% of sales) #1	#2	#3	SHARE CUM- #2	#3	NO. OF BRANDS NEEDED TO REACH %-OF-SALES GOAL 50%	67%	75%	90%	ONE-BRAND USERS (% of Total Users)
Hash, Canned	57.4	33.4	—	90.8		1	2	2	2	91.4
Instant Hot Lunches	33.7	21.4	18.6	55.1	73.7	2	3	4	NR	88.2
Liver Sausage	48.0	14.7	6.0	62.7	68.7	2	3	NR	NR	97.1
Mexican Foods	29.8	17.7	6.2	47.5	53.7	3	6	10	NR	57.3
Pasta, Canned	51.6	36.9	1.8	88.5	90.3	1	2	2	3	81.3
Pasta, Pkg'd.	18.7	10.0	9.2	28.7	37.9	5	10	16	NR	57.7
Pork Sausages	12.2	10.7	9.4	22.9	32.3	7	14	NR	NR	69.5
Potatoes, Instant	27.0	17.7	14.0	44.7	58.7	3	4	6	NR	66.1
Rice	30.6	12.3	6.6	42.9	49.5	4	7	10	NR	77.2
Soup, Canned	61.7	14.7	6.8	76.4	83.2	1	2	2	7	63.4
Soup, Dry Mix, Bouillon Cubes	32.3	13.2	12.5	45.5	58.0	3	5	6	NR	48.7
Stews, Canned	92.0	3.3	—	95.3		1	1	1	1	97.3
Tuna, Canned	31.3	31.3	14.4	62.6	77.0	2	3	3	8	66.9
AVERAGE	**40.0**	**14.8**	**8.2**	**54.8**	**63.0**					**74.4**

Heavily merchandised canned tuna finds the two top brands registering identical brand shares of 31.3 percent. The many specials that stores offer on canned tuna may help explain the relatively low percentage of loyal, i.e., one-brand, users at 66.9 percent.

Mexican foods also show a low incidence of one-brand users (57.3 percent), as shoppers dip into different brands to choose different types of specialty products. Brand diffusion is greatest for frankfurters/weiners, as Mediamark tabulates 27 different brand choices in addition to private label and generic.

SPICES/EXTRACTS/ MISC. GROCERY

(BASE = FEMALE HOMEMAKERS)	THREE TOP BRANDS (% of sales) #1	#2	#3	SHARE CUM- #2	#3	NO. OF BRANDS NEEDED TO REACH %-OF-SALES GOAL 50%	67%	75%	90%	ONE-BRAND USERS (% of Total Users)
Extracts	36.2	21.5	4.4	57.7	62.1	2	NR	NR	NR	88.4
Meat/Fish Extenders	91.1	5.8	—	96.9		1	1	1	1	90.2
Nonstick Cooking Products (Aerosol)	67.4	12.8	9.5	80.2	89.7	1	1	2	4	85.1
Salt	64.6	8.3	8.2	72.9	81.1	1	2	3	NR	93.0
Salt Substitutes	49.2	16.8	14.3	66.0	80.3	2	3	3	NR	93.9
Seasonings, Spices	24.0	14.0	13.7	38.0	51.7	3	6	8	15	44.3
AVERAGE	**55.4**	**13.2**	**8.4**	**68.6**	**77.0**					**82.5**

Shoppers seeking help with their menus in the meat/fish extenders section mostly maintain their allegiance to the brand that established this genre, giving it a whopping 91.1 percent share of sales, and a 90.2 percent incidence of one-brand shoppers. Infrequently purchased salt and salt substitutes also show high one-brand usage. For seasonings and spices, however, where lines include dozens of different items, shoppers spread their choices over several brands.

SOFT DRINKS

(BASE = ADULTS)	THREE TOP BRANDS (% of sales) #1	#2	#3	SHARE CUM- #2	#3	NO. OF BRANDS NEEDED TO REACH %-OF-SALES GOAL 50%	67%	75%	90%	ONE-BRAND USERS (% of Total Users)
Cola Drinks, Regular, Not Diet	40.8	36.4	5.0	77.2	82.2	2	2	2	8	63.7
Cola Drinks, Diet	32.1	23.2	7.9	55.3	63.2	2	4	5	12	59.2
Soft Drinks, Reg. (Not Cola)	16.8	10.5	9.6	27.3	36.9	5	9	14	NR	53.9
Soft Drinks, Diet (Not Cola)	24.7	10.6	8.3	35.3	43.6	4	8	11	NR	69.2
Water, Bottled	16.6	8.6	8.3	25.2	33.5	7	NR	NR	NR	48.4
AVERAGE	**26.2**	**17.9**	**7.8**	**44.1**	**51.9**					**58.9**

Both diet and regular colas show more domination by their brand leaders than do their non-cola counterparts. This means that to satisfy any pre-determined sales goal, many more brands of non-colas must be stocked than colas. Just what brands those are, however, are strongly influenced by regional variations in taste. A substantial four out of six cola drinkers stray beyond their regular brand.

NR—Not Reported Source: Mediamark Research Inc.

BRAND SHARE OF CATEGORY

DRY GROCERY (FOOD)

FAMILY BEVERAGES

(BASE = FEMALE HOMEMAKERS)	THREE TOP BRANDS (% of sales) SHARE / CUM- #1	#2	#3	NO. OF BRANDS NEEDED TO REACH %-OF-SALES GOAL 50%	67%	75%	90%	ONE-BRAND USERS (% of Total Users)
Coffee, Ground	19.1	11.1 / 30.2	9.7 / 39.9	5	8	11	NR	68.1
Coffee, Instant or Freeze Dried	16.7	15.4 / 32.1	12.6 / 44.7	4	6	7	17	69.4
Cream Substitute, Non-Dairy	56.7	14.5 / 71.2	10.5 / 81.7	1	2	3	NR	92.1
Drink Additives	26.7	13.0 / 39.7	12.2 / 51.9	3	5	7	13	61.2
Energy Drinks	86.9	1.5 / 88.4	—	1	1	1	NR	98.4
Milk, Dry	44.2	5.4 / 49.6	3.2 / 52.8	3	NR	NR	NR	92.6
Milkshakes/Milkshake Mixes	64.0	29.8 / 93.8	—	1	2	2	2	97.5
Powdered Soft Drinks	34.7	20.3 / 55.0	5.2 / 60.2	2	5	7	NR	57.2
Tea, Instant	48.6	37.5 / 86.1	1.5 / 87.6	2	2	2	NR	87.3
Tea, Regular	35.2	16.3 / 51.5	5.0 / 56.5	2	6	9	NR	62.3
Iced Tea Mix, Instant	39.5	33.5 / 73.0	3.6 / 76.6	2	2	3	NR	83.0
AVERAGE	**42.9**	**18.0 / 60.9**	**5.8 / 66.7**					**79.0**

Both ground coffee and instant or freeze-dried coffee share remarkably similar profiles, with the #1 brand achieving less than a 20 percent share, and the top three cumulative share at about 40 percent. These coupon-blitzed categories maintain a relatively high degree of brand loyalty, with only three out of 10 users reporting multiple-brand usage.

Just two brands dominate the instant ice tea mix category, with their joint share 73.0 percent. Similarly, two brands provide 55.0 percent of sales for the powdered soft drinks category, with lesser brands adding only small bites.

WINE

(BASE = ADULTS)	THREE TOP BRANDS (% of sales) SHARE / CUM- #1	#2	#3	NO. OF BRANDS NEEDED TO REACH %-OF-SALES GOAL 50%	67%	75%	90%	ONE-BRAND USERS (% of Total Users)
Vermouth	48.7	16.3 / 65.0	8.5 / 73.5	2	3	4	NR	80.5
Wine, Domestic, Dinner Table	19.2	10.8 / 30.0	8.8 / 38.8	5	13	20	NR	66.6
Wine, Imported, Dinner Table	32.2	7.3 / 39.5	6.4 / 45.9	4	9	NR	NR	74.3
Wine, Sparkling, Cold Duck, Champagne	21.5	11.4 / 32.9	7.5 / 40.4	5	12	NR	NR	75.6
Wine, Dessert/Port/Sherry	27.6	23.8 / 51.4	12.3 / 63.7	2	4	5	NR	81.3
Wine, Party/Pop/Sangria	15.7	14.2 / 29.9	11.6 / 41.5	4	6	7	NR	77.6
Wine, Aperitif & Specialty	36.8	27.5 / 64.3	21.7 / 86.0	2	3	3	NR	90.7
AVERAGE	**28.8**	**15.9 / 44.7**	**11.0 / 55.7**					**78.1**

With the the many kinds of domestic and imported wines being offered, it's difficult for brands to dominate their categories. The exception is vermouth, which is more often a bar staple to be mixed with other drinks than a beverage on its own. Drinkers of domestic dinner table wine are most prone to experiment with more than one label and appreciate finding a variety of choices when they shop.

SNACKS

(BASE = FEMALE HOMEMAKERS)	THREE TOP BRANDS (% of sales) SHARE / CUM- #1	#2	#3	NO. OF BRANDS NEEDED TO REACH %-OF-SALES GOAL 50%	67%	75%	90%	ONE-BRAND USERS (% of Total Users)
Corn/Tortilla Chips & Cheese Snacks	24.2	11.9 / 36.1	9.1 / 45.2	4	8	10	16	38.6
Nuts	41.1	9.8 / 50.9	8.1 / 59.0	2	5	NR	NR	81.3
Potato Chips	20.9	18.2 / 39.1	6.8 / 45.9	4	8	13	NR	60.8
Popping Corn, Popcorn Snacks	19.7	16.8 / 36.5	9.0 / 45.5	4	10	NR	NR	73.2
Pretzels	16.6	14.6 / 31.2	12.3 / 43.5	4	6	8	NR	75.1
Snack Bars	26.0	20.2 / 46.2	15.6 / 61.8	3	4	5	9	55.1
AVERAGE	**24.7**	**15.2 / 39.9**	**10.2 / 50.1**					**64.0**

At 24.7 percent, the average brand share represented by #1 snack brands is the lowest of any food class in this report. The only exception to this pattern of diffuse brand leadership is nuts, where #1 manages a substantial 41.1 percent share. The two other sales heavies—potato chips and corn/tortilla chips and cheese snacks—share almost twin profiles, with the top three brands accounting for about 45 percent of sales, and eight brands needed to equal 67 percent of sales.

NR—Not Reported Source: Mediamark Research Inc.

DRY GROCERY (FOOD)

LIQUOR/COCKTAIL MIXES (BASE = ADULTS)	THREE TOP BRANDS (% of sales) #1	#2 SHARE / CUM-	#3 SHARE / CUM-	NO. OF BRANDS NEEDED TO REACH %-OF-SALES GOAL 50%	67%	75%	90%	ONE-BRAND USERS (% of Total Users)
Bourbon	30.0	15.3 / 45.3	7.8 / 53.1	3	6	8	NR	71.2
Brandy	26.2	16.1 / 42.3	11.3 / 53.6	3	6	10	NR	82.6
Canadian Whiskey	20.4	19.7 / 40.1	15.9 / 56.0	3	4	5	8	76.1
Cognac	35.0	26.0 / 61.0	20.8 / 81.8	2	3	3	4	74.2
Cordials/Liqueurs	15.2	13.6 / 28.8	11.1 / 39.9	5	9	12	21	46.0
Gin	18.3	16.4 / 34.7	14.0 / 48.7	4	5	6	NR	71.7
Irish Whiskey	42.7	26.2 / 68.9	12.0 / 80.9	2	2	3	NR	90.2
Prepared Mixed Drinks (with liquor)	20.2	15.0 / 35.2	13.5 / 48.7	4	NR	NR	NR	81.3
Prepared Mixed Drinks (without liquor)	32.4	16.0 / 48.4	14.1 / 62.5	3	4	4	6	83.3
Rum	61.8	9.1 / 70.9	5.3 / 76.2	1	2	3	NR	82.4
Rye or Blended Whiskey	48.1	12.0 / 60.1	9.3 / 69.4	2	3	4	NR	83.5
Scotch Whiskey	13.9	13.1 / 27.0	9.7 / 36.7	5	8	11	NR	62.4
Tequila	43.1	10.2 / 53.3	5.1 / 58.4	2	6	NR	NR	86.3
Vodka	33.0	11.2 / 44.2	6.3 / 50.5	3	9	13	NR	77.1
AVERAGE	**31.5**	**15.7 / 47.2**	**11.2 / 58.4**					**76.3**

The dominance of the #1 brand of rum is so forceful that its name is almost a synonym for that beverage. The three other categories where #1 captures more than 40 percent of sales are rye or blended whiskey (48.1), tequila (43.1) and Irish whiskey (42.7). Another link among these four categories is their above-average incidence of one-brand users.

The lowest category for one-brand users, and the second-lowest (after Scotch) in #1 brand share is cordials/liqueurs, where hosts often buy several brands to anticipate their guests' tastes. Cordials/liqueurs and Scotch, along with brandy and vodka, are the categories which demand the most brands be stocked.

BEER (BASE = ADULTS)	THREE TOP BRANDS (% of sales) #1	#2 SHARE / CUM-	#3 SHARE / CUM-	NO. OF BRANDS NEEDED TO REACH %-OF-SALES GOAL 50%	67%	75%	90%	ONE-BRAND USERS (% of Total Users)
Ale	45.3	15.3 / 60.6	8.4 / 69.0	2	3	4	8	79.5
Beer, Domestic/Low Calorie	41.1	18.3 / 59.4	15.9 / 75.3	2	3	3	7	64.8
Beer, Domestic, Regular	26.8	11.8 / 38.6	8.2 / 46.8	4	7	9	19	58.1
Beer, Imported	32.0	12.8 / 44.8	11.0 / 55.8	3	5	6	NR	57.1
Beer, Low Alcohol	40.6	31.2 / 71.8	8.5 / 80.3	2	2	3	5	97.3
Malt Liquor	29.3	25.5 / 54.8	17.2 / 72.0	2	3	4	5	76.7
AVERAGE	**35.9**	**19.2 / 55.1**	**11.5 / 66.6**					**72.3**

Regular domestic beer shows the widest dispersion among several brands, with 19 needed to account for 90 percent of sales. Ale, low calorie domestic beer and low-alcohol beer are all dominated by a #1 brand that soaks up over 40 percent of sales. Drinkers of low-alcohol beer are most likely to buy only one brand, perhaps in part a reflection of still-limited choices offered by some retailers.

SAUCES (BASE = FEMALE HOMEMAKERS)	THREE TOP BRANDS (% of sales) #1	#2 SHARE / CUM-	#3 SHARE / CUM-	NO. OF BRANDS NEEDED TO REACH %-OF-SALES GOAL 50%	67%	75%	90%	ONE-BRAND USERS (% of Total Users)
Barbecue & Seasoning, Bottled	17.5	14.2 / 31.7	12.6 / 44.3	4	6	8	NR	43.8
Gravy/Sauce Mixes	21.0	16.1 / 37.1	11.8 / 48.9	4	5	6	9	73.4
Soy Sauce	47.1	35.1 / 82.2	13.2 / 95.4	2	2	2	3	90.3
Spaghetti Sauce	25.4	24.3 / 49.7	10.0 / 59.7	3	4	6	10	66.9
AVERAGE	**27.7**	**22.4 / 50.1**	**11.9 / 62.0**					**68.6**

In the competitive spaghetti sauce category, two brands head the pack with close to one-quarter of sales each. Soy sauce is top loaded in brand strength, with three brands producing 95.4 percent of total sales. One-brand users are highest for soy sauce, probably in part because of less frequent purchases than for other sauces.

NR—Not Reported Source: Mediamark Research Inc.

DRY GROCERY (NON-FOOD)

SOAPS (NON-LAUNDRY)

(BASE = FEMALE HOMEMAKERS)	THREE TOP BRANDS (% of sales) #1	#2 SHARE	#3 CUM-	NO. OF BRANDS NEEDED TO REACH %-OF-SALES GOAL 50%	67%	75%	90%	ONE-BRAND USERS (% of Total Users)
Bar Soap, Personal Care	16.6	14.0 / 30.6	10.6 / 41.2	5	8	10	16	47.1
Liquid Soap, Personal Care	28.2	22.9 / 51.1	14.5 / 65.6	2	4	5	8	83.1
Automatic Dishwashing Detergent	58.9	11.9 / 70.8	6.0 / 76.8	1	2	3	NR	77.0
Dishwashing Liquid	26.2	16.5 / 42.7	14.4 / 57.1	3	4	5	9	70.6
Hand Cleaners, Heavy Duty	49.3	21.6 / 70.9	20.4 / 91.3	2	2	3	3	90.3
AVERAGE	**35.8**	**17.4 / 53.2**	**13.2 / 66.4**					**73.6**

Coming clean with buyers of personal care bar soap means stocking several brands (Mediamark records purchase patterns for 29 brands in addition to private label and generic). Loyalty is below average (47.1 percent), as users try various brands rather than sticking with one favorite. The strongest impression made by a #1 brand is in the automatic dishwashing detergent category (58.9 percent).

HOUSEHOLD CLEANERS

(BASE = FEMALE HOMEMAKERS)	THREE TOP BRANDS (% of sales) #1	#2 SHARE	#3 CUM-	NO. OF BRANDS NEEDED TO REACH %-OF-SALES GOAL 50%	67%	75%	90%	ONE-BRAND USERS (% of Total Users)
Carpet/Rug Cleaners	32.0	15.0 / 47.0	12.9 / 59.9	3	4	6	12	75.5
Drain Cleaners	31.6	29.1 / 60.7	25.1 / 85.8	2	3	3	5	86.1
Floor Wax/Polish	33.5	15.2 / 48.7	11.0 / 59.7	3	4	6	10	76.6
Furniture Polish	27.8	13.9 / 41.7	13.4 / 55.1	3	5	6	11	65.0
Glass Cleaners	51.3	30.1 / 81.4	3.4 / 84.8	1	2	2	5	84.2
Household Cleaners	19.3	9.0 / 28.3	7.7 / 36.0	6	9	11	18	25.4
In-Bowl Toilet Cleaners	29.0	16.1 / 45.1	15.0 / 60.1	3	4	5	7	82.9
In-Tank Toilet Cleaners	15.6	15.4 / 31.0	13.8 / 44.8	4	5	6	9	79.4
Metal Polish	26.4	15.1 / 41.5	12.9 / 54.4	3	5	6	9	71.9
Oven Cleaners	33.4	22.9 / 56.3	20.3 / 76.6	2	3	3	4	53.4
Scouring Pads	49.2	32.7 / 81.9	3.7 / 85.6	2	2	2	5	75.5
Scouring Powder	58.1	27.0 / 35.1	5.3 / 90.4	1	2	2	3	79.3
AVERAGE	**33.9**	**20.1 / 54.0**	**12.0 / 66.0**					**71.3**

Heaviest concentration among brand leaders is found in the scouring powder and glass cleaners categories, both of which show a #1 brand with more than a 50 percent share. For both of these categories, only a handful of brands will satisfy 75 percent or even 90 percent of demand.

On the other end of the scale, brand shares are quite diffused among household cleaners, a broad category that includes brands designed for several specialized tasks. This means that most consumers need to use more than one of these brands to accomplish all their cleaning duties, as reflected in the very low (25.4 percent) incidence of one-brand users.

PAPER/PLASTIC PRODUCTS

(BASE = FEMALE HOMEMAKERS)	THREE TOP BRANDS (% of sales) #1	#2 SHARE	#3 CUM-	NO. OF BRANDS NEEDED TO REACH %-OF-SALES GOAL 50%	67%	75%	90%	ONE-BRAND USERS (% of Total Users)
Aluminum Foil	69.9	10.6 / 80.5	3.3 / 83.8	1	1	2	NR	88.4
Disposable Cups	62.6	14.3 / 76.9	5.2 / 82.1	1	2	2	NR	86.8
Disposable Diapers	30.9	27.4 / 58.3	22.9 / 81.2	2	3	3	NR	66.2
Disposable Household Wipes	72.8	12.4 / 85.2	2.7 / 87.9	1	1	2	NR	93.5
Disposable Plates	21.6	14.5 / 36.1	5.8 / 41.9	5	NR	NR	NR	80.9
Facial Tissues	28.9	17.5 / 46.4	12.3 / 58.7	3	5	6	NR	67.9
Kitchen Wrap, Plastic	31.4	23.7 / 55.1	21.2 / 76.3	2	3	3	4	76.9

The three billion-dollar-a-year best sellers in this department (according to SB's Consumer Expenditures Study, September 1985) are disposable diapers, paper towels and toilet paper. While three brands pretty much tell the story in the case of disposable diapers (equalling 81.2 percent of sales), the top three brands in paper towels (54.1 percent) and toilet paper (46.4 percent) fall far short of that achievement, necessitating the stocking of nine brands to achieve a 75 percent sales goal.

NR—Not Reported Source: Mediamark Research Inc.

BRAND SHARE OF CATEGORY

DRY GROCERY (NON-FOOD)

PAPER/PLASTIC PRODUCTS
Continued

(BASE = FEMALE HOMEMAKERS)	THREE TOP BRANDS (% of sales) #1	#2	#3	NO. OF BRANDS NEEDED TO REACH %-OF-SALES GOAL 50%	67%	75%	90%	ONE-BRAND USERS (% of Total Users)
Oven Cooking Bags	88.6	3.8 / 92.4	—	1	1	1	2	97.7
Paper Napkins	17.2	13.8 / 31.0	12.2 / 43.2	4	8	11	NR	80.2
Paper Towels	26.5	14.1 / 40.6	13.5 / 54.1	3	6	9	NR	64.6
Plastic Garbage Bags/ Trash Can Liners	33.7	25.3 / 59.0	2.9 / 61.9	2	NR	NR	NR	73.6
Plastic Sandwich/Food/Freezer Bags	32.1	22.7 / 54.8	21.5 / 76.3	2	3	3	NR	66.2
Pre-Moistened Cleaning Wipes	39.1	11.4 / 50.5	10.9 / 61.4	2	4	5	NR	71.6
Toilet Paper	23.4	11.9 / 35.3	11.1 / 46.4	4	6	9	NR	60.8
Waxed Paper	68.6	15.2 / 83.8	2.9 / 86.7	1	1	2	5	94.1
AVERAGE	**43.2**	**15.9 / 59.1**	**9.9 / 69.0**					**83.5**

These three categories share a seepage in brand loyalty, with about one-third of users identifying themselves as multi-brand users. This may be explained in part by the heavy promotional exposure they receive both in weekly specials and coupon distribution. Paper napkins show the lowest concentration among the three leading brands.

HOUSEHOLD SUPPLIES

(BASE = FEMALE HOMEMAKERS)	THREE TOP BRANDS (% of sales) #1	#2	#3	NO. OF BRANDS NEEDED TO REACH %-OF-SALES GOAL 50%	67%	75%	90%	ONE-BRAND USERS (% of Total Users)
Cellophane Tape	65.2	21.6 / 86.8	4.2 / 91.0	1	2	2	3	88.4
Indoor Insecticides	34.3	22.2 / 56.5	12.7 / 69.2	2	3	5	NR	82.2
Insect Repellants	40.3	20.9 / 61.2	19.9 / 81.1	2	3	3	5	84.3
Light Bulbs	36.4	23.9 / 60.3	13.5 / 73.8	2	3	4	NR	79.8
Outdoor Insecticides	45.2	18.3 / 63.5	14.5 / 78.0	2	3	3	NR	81.9
Roach Traps	42.3	27.3 / 69.6	20.8 / 90.4	2	2	3	3	85.6
Rubber Gloves	81.6	4.7 / 86.3	—	1	1	1	NR	97.5
Sprays/Room Deodorizers	17.0	13.9 / 30.9	11.0 / 41.9	4	7	9	13	64.2
Water Conditioners	55.4	30.0 / 85.4	—	1	2	2	NR	96.6
AVERAGE	**46.4**	**20.3 / 66.7**	**10.7 / 77.4**					**84.5**

In only one of the categories shown here—sprays/room deodorizers—is more than a few leading brands needed to satisfy the overwhelming proportion of shopper demand. Deodorizers show a below-average incidence of one-brand users as different brands are favored for different purposes (bathroom versus kitchen etc.). For products like rubber gloves, cellophane tape and water conditioners, the #1 brands exhibit an elephantine dominance.

PET PRODUCTS

(BASE = FEMALE HOMEMAKERS)	THREE TOP BRANDS (% of sales) #1	#2	#3	NO. OF BRANDS NEEDED TO REACH %-OF-SALES GOAL 50%	67%	75%	90%	ONE-BRAND USERS (% of Total Users)
Dog Food, Canned	24.2	17.6 / 41.8	17.3 / 59.1	3	4	5	NR	69.6
Dog Food, Dry	19.0	6.2 / 25.2	5.0 / 30.2	9	NR	NR	NR	74.9
Dog Food, Moist	39.0	22.6 / 61.6	9.7 / 71.3	2	3	NR	NR	61.8
Cat Food, Canned	29.2	19.2 / 48.4	16.5 / 64.9	3	4	5	NR	63.3
Cat Food, Dry	21.9	12.9 / 34.8	9.5 / 44.3	4	8	10	NR	61.2
Cat Food, Moist	53.9	17.4 / 71.3	9.1 / 80.4	1	2	3	NR	80.6
Dog Biscuits, Treats	29.3	14.0 / 43.3	10.9 / 54.2	3	5	6	11	59.6
Cat Litter	21.4	15.1 / 36.5	11.9 / 48.4	4	6	NR	NR	75.2
Flea/Tick Care Products	43.8	25.2 / 69.0	9.1 / 78.1	2	2	3	NR	83.2
AVERAGE	**31.3**	**16.7 / 48.0**	**11.0 / 59.0**					**69.9**

Small wonder that pet food departments are bulging with bags of dry dog food. Only one brand (#1 with a 19.0 percent share) captures more than 6 percent of sales, with about a dozen brands maintaining low single-digit shares. With dog owners showing higher brand loyalty for dry foods than for canned or moist, picking enough—and the correct—brands to stock can be a Great Dane-sized problem. In the cat food sector too, less brand leadership is evidenced in dry rather than in either canned or moist.

NR—Not Reported
Source: Mediamark Research Inc.

DRY GROCERY (NON-FOOD)

TOBACCO

(BASE = ADULTS)	THREE TOP BRANDS (% of sales) #1	#2 SHARE	#3 CUM-	NO. OF BRANDS NEEDED TO REACH %-OF-SALES GOAL 50%	67%	75%	90%	ONE-BRAND USERS (% of Total Users)
Cigarettes	10.3	4.4 / 14.7	4.2 / 18.9	16	33	44	88	80.2
Cigarillos, Little Cigars	17.5	11.7 / 29.2	10.8 / 40.0	4	NR	NR	NR	93.1
Cigars*	19.5	12.6 / 32.1	10.5 / 42.6	4	7	NR	NR	77.9
Pipe Tobacco*	11.6	8.5 / 20.1	8.4 / 28.5	NR	NR	NR	NR	82.7
Chewing/Smokeless Tobacco*	32.4	23.3 / 55.7	14.5 / 70.2	2	3	4	NR	79.8
Disposable Lighters	79.3	14.0 / 93.3	1.9 / 95.2	1	1	1	3	83.8
AVERAGE	**28.4**	**12.4 / 40.8**	**8.4 / 49.2**					**82.9**

To maintain the patronage of brand-loyal cigarette smokers who'd rather take flight (to another store) than switch, supermarkets long ago conceded the importance of stocking as many brands as possible. The other smokables also show a pattern of many brands competing for and then holding their own small brand-share niche. For smokeless, however, just three brands account for 70.2 percent of sales.

*BASE = MEN

LAUNDRY SUPPLIES

(BASE = FEMALE HOMEMAKERS)	THREE TOP BRANDS (% of sales) #1	#2 SHARE	#3 CUM-	NO. OF BRANDS NEEDED TO REACH %-OF-SALES GOAL 50%	67%	75%	90%	ONE-BRAND USERS (% of Total Users)
Bleach	51.6	19.6 / 71.2	6.7 / 77.9	1	2	3	NR	73.8
Fabric Softeners	26.7	24.8 / 51.5	11.5 / 63.0	2	4	5	11	73.3
Laundry Detergent	9.6	8.5 / 18.1	7.1 / 25.2	8	13	17	NR	52.4
Laundry, Pre-Cleaners/ Pre-Treatments	18.4	16.8 / 35.2	15.0 / 50.2	3	5	6	14	72.4
Soap/Detergent, Fine Fabrics	31.6	9.1 / 40.7	8.8 / 49.5	4	8	11	19	80.6
Starch	25.9	20.1 / 46.0	17.6 / 63.6	3	4	4	5	83.9
AVERAGE	**27.3**	**16.5 / 43.8**	**11.1 / 54.9**					**72.7**

With Mediamark tabulating usage of 33 laundry detergent brands, it's not surprising that the three leaders satisfy only one-quarter of demand. Incessant couponing for both established and new brands has apparently helped batten down one-brand users to a thin 52.4 percent. Brand leadership is most assertive in the bleach category, with #1 taking over half of sales. For both the regular and fine fabric varieties of detergents a double-digit number of brands must be stocked to meet 75 percent of demand.

DAIRY

DAIRY

(BASE = FEMALE HOMEMAKERS)	THREE TOP BRANDS (% of sales) #1	#2 SHARE	#3 CUM-	NO. OF BRANDS NEEDED TO REACH %-OF-SALES GOAL 50%	67%	75%	90%	ONE-BRAND USERS (% of Total Users)
American, Past. Processed Cheese	29.4	22.4 / 51.8	5.6 / 57.4	2	6	NR	NR	75.7
Butter	44.4	6.7 / 51.1	3.3 / 54.4	2	NR	NR	NR	89.0
Cheese Spread	31.2	4.2 / 35.4	4.1 / 39.5	NR	NR	NR	NR	87.1
Cream Cheese	77.9	2.7 / 80.6	2.2 / 82.8	1	1	1	NR	89.7
Dips, Ready To Serve	24.0	11.3 / 35.3	10.4 / 45.7	4	NR	NR	NR	80.9
Margarine	18.2	16.4 / 34.6	14.1 / 48.7	4	8	12	NR	58.9
Orange Juice, Not Frozen	25.0	19.5 / 44.5	14.8 / 59.3	3	5	8	NR	72.3
Refrigerated Dough Products	24.6	13.8 / 38.4	9.3 / 47.7	4	6	8	NR	65.0
Sour Cream	19.1	17.9 / 37.0	12.7 / 49.7	4	NR	NR	NR	93.2
Yogurt	23.2	15.0 / 38.2	10.9 / 49.1	4	9	13	NR	64.2
Yogurt Drinks	50.3	18.2 / 68.5	8.5 / 77.0	1	2	3	NR	83.0
AVERAGE	**33.4**	**13.5 / 46.9**	**8.7 / 55.6**					**78.1**

One of the most heavily merchandised categories in dairy is margarine, where coupons strongly vie with personal tastes in brand choice. With so many brands fighting for share here, it's small wonder that the incidence of one-brand users is lower than for any other dairy category, and that more brands are needed to satisfy 67 percent or 75 percent of demand. In contrast, the #1 butter brand commands 44.4 percent of sales and the share of one-brand users is an impressive 89.0 percent.

NR—Not Reported Source: Mediamark Research Inc.

FROZEN FOODS

FROZEN FOODS	THREE TOP BRANDS (% of sales) SHARE / CUM-			NO. OF BRANDS NEEDED TO REACH %-OF-SALES GOAL				ONE-BRAND USERS (% of Total Users)
(BASE = FEMALE HOMEMAKERS)	#1	#2	#3	50%	67%	75%	90%	
Breaded Boneless Chicken	27.8	25.9 / 53.7	17.2 / 70.9	2	3	4	NR	73.2
Fried Chicken	62.9	12.8 / 75.7	9.4 / 85.1	1	2	2	4	78.6
Complete Breakfast	90.4	—	—	1	1	1	1	69.3
Complete Dinners	29.6	16.6 / 46.2	15.9 / 62.1	3	4	5	7	58.5
Cornish Hens	33.5	24.4 / 57.9	13.1 / 71.0	2	3	4	NR	61.2
Corn-On-The-Cob	44.6	38.5 / 83.1	7.0 / 90.1	2	2	2	3	84.6
Desserts	19.1	13.7 / 32.8	9.4 / 42.2	4	7	9	18	55.6
Main Courses	24.0	18.8 / 42.8	15.1 / 57.9	3	4	5	8	53.5
Orange Juice	29.0	10.8 / 39.8	8.5 / 48.3	4	8	12	NR	64.9
Pancakes/French Toast	42.7	29.0 / 71.7	6.2 / 77.9	2	2	3	6	80.8
Pizza	16.7	14.4 / 31.1	9.2 / 40.3	5	7	9	NR	66.6
Potato Products	36.5	18.2 / 54.7	17.0 / 71.7	2	3	4	NR	56.9
Vegetables, Plain	21.4	16.2 / 37.6	4.1 / 41.7	6	NR	NR	NR	52.4
Vegetables, Prepared	37.1	31.9 / 69.0	5.8 / 74.8	2	2	4	NR	59.6
Waffles	40.5	28.1 / 68.6	18.2 / 86.8	2	2	3	5	82.1
Yogurt	24.0	22.5 / 46.5	13.5 / 60.0	3	4	NR	NR	87.1
AVERAGE	**36.2**	**20.1 / 56.3**	**10.6 / 66.9**					**67.8**

The frozen foods department is the traditional site of one of the hardest-fought battles in the supermarket for space. Marginal brands live in constant threat of being exiled and new brands must mount a determined assault to win admittance.

Against this perspective, we find only three categories where more than five brands are needed to satisfy 75 percent of demand: desserts and pizza (nine each) and orange juice (12).

The need to stock so many brands, however, is tempered by indications that brand loyalty is below average, as indicated by anemic incidence of one-brand users. For fried chicken, complete breakfasts and waffles, the top three brands satisfy about 90 percent of demand.

GENERAL MERCHANDISE

AUTO SUPPLIES	THREE TOP BRANDS (% of sales) SHARE / CUM-			NO. OF BRANDS NEEDED TO REACH %-OF-SALES GOAL				ONE-BRAND USERS (% of Total Users)
(BASE = ADULTS)	#1	#2	#3	50%	67%	75%	90%	
Anti-Freeze	67.5	6.0 / 73.5	4.5 / 78.0	1	1	3	7	93.9
Auto Wax/Polish	16.3	12.1 / 28.4	7.8 / 36.2	6	10	14	23	83.0
Gasoline Additives	46.1	12.6 / 58.7	8.7 / 67.4	2	3	NR	NR	90.9
Motor Oil	22.3	21.4 / 43.7	13.3 / 57.0	3	5	8	20	83.0
Motor Oil Additives	36.4	19.0 / 55.4	2.5 / 57.9	2	NR	NR	NR	97.0
AVERAGE	**37.7**	**14.2 / 51.9**	**7.4 / 59.3**					**89.6**

Brand leader in the auto supplies categories is strongest in antifreeze, where #1 carries off over two-thirds of sales. At the other end of the line, both motor oil and auto wax and polishes spread their sales over a galaxy of brands, with 20 or more being listed to achieve a 90-percent-of-sales goal. For all the auto supplies categories, the incidence of one-brand usage is high, suggesting that failure to stock a customer's preferred brand may send him shopping elsewhere.

Continued on page 48

NR—Not Reported Source: Mediamark Research Inc.

Continued from page 44

GENERAL MERCHANDISE

GENERAL MERCHANDISE (BASE = ADULTS)	THREE TOP BRANDS (% of sales) #1	#2	#3	SHARE CUM- #2	#3	NO. OF BRANDS NEEDED TO REACH %-OF-SALES GOAL 50%	67%	75%	90%	ONE-BRAND USERS (% of Total Users)
Batteries	45.1	27.7	20.9	72.8	93.7	2	2	3	3	66.7
Film	74.4	7.2	6.6	81.6	88.2	1	1	2	4	80.9
Indoor Plant Food	35.9	15.1	13.2	51.0	64.2	2	4	4	NR	92.8
Pantyhose/Stockings	33.0	20.6	5.8	53.6	59.4	2	5	NR	NR	71.4
Video Tape/Discs (Purchase)	16.7	16.5	14.5	33.2	47.7	4	5	6	NR	48.4
AVERAGE	**41.0**	**17.4**	**12.2**	**58.4**	**70.6**					**72.0**

In the film category (which includes cartridges, disks and instant developing film in addition to rolls) the #1 brand achieves three quarters of sales, with the runner-up at only 7.2 percent. Two brands account for 53.6 percent of pantyhose/stockings sales, with three out of 10 users reporting multiple-brand purchase. No strong brand leaders have emerged in the fast-growing videotapes/disks sectors, as users presumably are unable to discern brand-to-brand quality differences.

HEALTH & BEAUTY AIDS

BABY/CHILDREN HBA (BASE = FEMALE HOMEMAKERS)	THREE TOP BRANDS (% of sales) #1	#2	#3	SHARE CUM- #2	#3	NO. OF BRANDS NEEDED TO REACH %-OF-SALES GOAL 50%	67%	75%	90%	ONE-BRAND USERS (% of Total Users)
Baby Lotion	54.4	20.9	17.0	75.3	92.3	1	2	2	3	88.0
Baby Oil	65.7	14.8	—	80.5		1	2	2	NR	91.4
Baby Ointments	46.2	26.6	17.6	72.8	90.4	2	2	3	3	78.6
Baby Powder	58.6	13.6	12.4	72.2	84.6	1	2	3	5	82.6
Baby Shampoo	76.6	5.7	4.5	82.3	86.8	1	1	1	NR	93.4
Childrens Cold Tablets	33.7	31.5	16.6	65.2	81.8	2	3	3	NR	88.4
Childrens Cough Syrup	16.9	10.6	8.9	27.5	36.4	NR	NR	NR	NR	94.0
Childrens Fever Reducers/ Pain Relievers	40.4	9.4	9.0	49.8	58.8	3	5	7	NR	74.3
Liquid Baby Bath	54.0	31.6	—	85.6		1	2	2	NR	93.0
Soap For Baby	44.1	28.7	12.3	72.8	85.1	2	2	3	NR	88.2
Teething Remedies	50.1	28.4	17.3	78.5	95.8	1	2	2	3	92.0
Vitamins, Childrens	11.5	11.5	10.4	23.0	33.4	6	9	11	NR	83.0
AVERAGE	**46.0**	**19.4**	**10.5**	**65.4**	**75.9**					**87.2**

Finding the "best" product to treat babies and young children is a high priority among mothers, as evidenced by the unusually high percent in almost every category who are one-brand users. Even where there is no dominant brand or brands, as is the case with children's cough syrup, mothers obviously believe they have chosen the best brand and remain loyal to it.

Most of the categories have strong entries among the top three brands, with their overall category average of a 75.9 percent share of sales the fourth highest among the 36 product classes shown in this report. The 87.2 percent average for one-brand users is also one of the highest.

COSMETICS (WOMEN) (BASE = WOMEN)	THREE TOP BRANDS (% of sales) #1	#2	#3	SHARE CUM- #2	#3	NO. OF BRANDS NEEDED TO REACH %-OF-SALES GOAL 50%	67%	75%	90%	ONE-BRAND USERS (% of Total Users)
Blusher	11.3	10.7	9.7	22.0	31.7	6	9	12	26	81.7
Complexion Care	18.3	8.3	7.2	26.6	33.8	9	25	NR	NR	69.8
Eye Liner	27.5	12.5	8.3	40.0	48.3	4	7	9	NR	82.8
Eye Shadow	17.2	14.4	11.9	31.6	43.5	4	7	9	NR	72.3
Face Powder, Loose	14.0	10.1	10.0	24.1	34.1	6	9	11	NR	90.7
Foundation Makeup	17.5	10.3	9.0	27.8	36.8	6	9	12	24	81.1
Lipstick/Lip Gloss	21.4	10.2	8.4	31.6	40.0	5	10	15	NR	73.4

With relatively little room to devote to cosmetics, the multi-item lines are a challenge to HBA buyers. The complexity of the problem is illustrated by nail polish and nail polish removers, both of which command an over-90 percent incidence of one-brand users, women who presumably have found what pleases them and want to keep buying it.

Continued on page 54

NR—Not Reported Source: Mediamark Research Inc.

instore BUSINESS

FOR DELIS, BAKERIES & FOOD SERVICE

CLASS IN '86 4A
ROBERT DIETRICH
Although universally acknowledged as the class acts of the supermarket, bakeries and delis are in no danger of becoming encrusted with tradition. They're sprinting boldly ahead with new strategies that upgrade everything from their design and equipment to their merchandise mix.

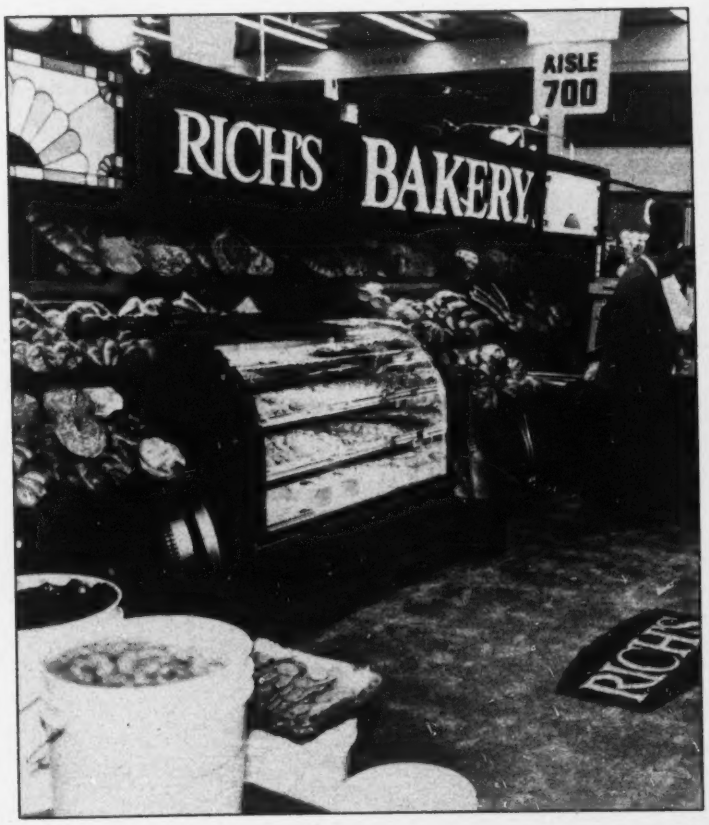
CALLING ALL DELI SUPPLIERS: PLEASE SEND SOME MORE HELP 15A
ROBERT DIETRICH
Our latest research find that merchandisers are looking for more, and better, support from their supplier partners. Their doors are open wide to more demos and, of course, more and bigger allowances.

ROADS TO PROFIT MAPPED AT R.B.A. SESSIONS 21A
ROBERT DIETRICH
Instore executives at this Milwaukee conclave were advised to escalate profits by: (1) improving product presentation, (2) refining hiring and training procedures, and (3) harmonizing departmental concept with that of the overall store.

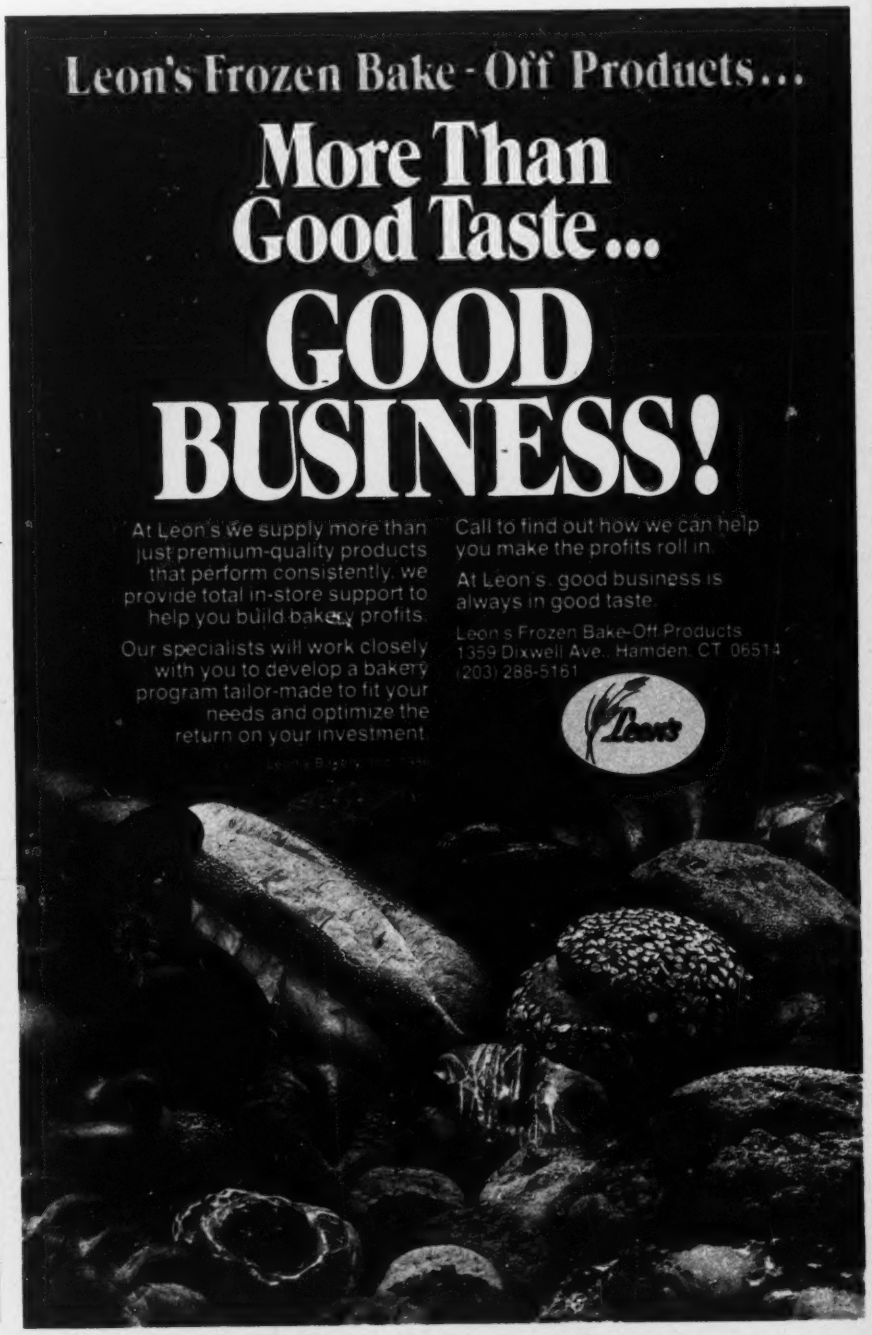
PIZZA SLICES UP SPICY DELI SALES 29A
FRANK HAMMEL
With trendy toppings running the gamut from artichoke to zucchini, pizza reigns as pharoah of fast foods. Delis are counting on the force of fresh-made to vanquish their pepperoni pitstop competition.

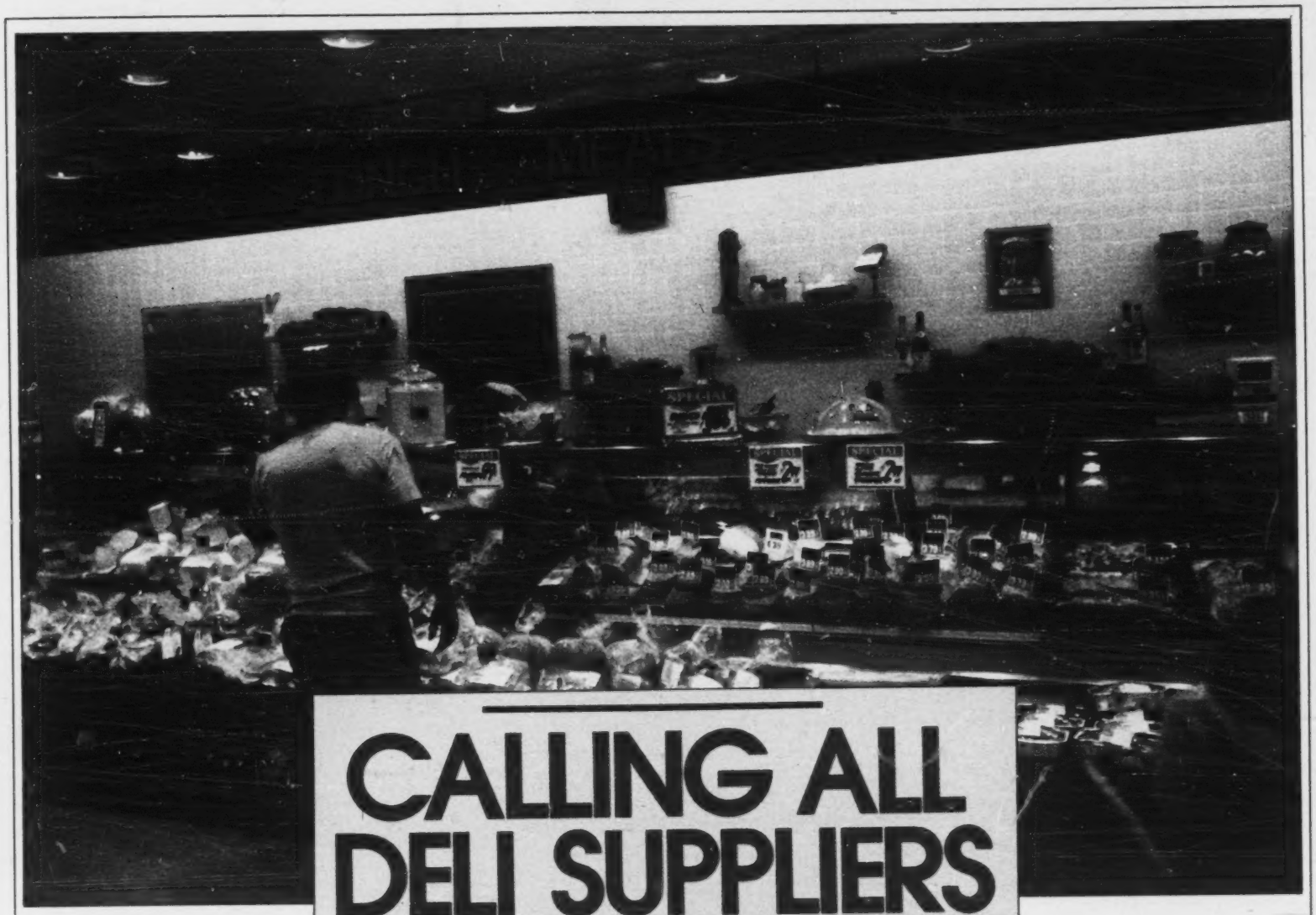
AD-ING TO DELI-BAKERY SALES 33A
KEVIN COUPE
Long buried among the necropolis of tombstones that constitutes many supermarket ads, delis and bakeries are at last finding their place in the sun in some innovative new advertising campaigns.

NEW EQUIPMENT 37A
NEW PRODUCTS 38A



R.B.A. sessions..... p. 21A


Leon's Frozen Bake-Off Products...
More Than Good Taste...
GOOD BUSINESS!
At Leon's we supply more than just premium-quality products that perform consistently, we provide total in-store support to help you build bakery profits.
Our specialists will work closely with you to develop a bakery program tailor-made to fit your needs and optimize the return on your investment.
Call to find out how we can help you make the profits roll in.
At Leon's, good business is always in good taste.
Leon's Frozen Bake-Off Products
1359 Dixwell Ave., Hamden, CT 06514
(203) 288-5161
Leon's



CALLING ALL DELI SUPPLIERS

MERCHANDISERS ASK FOR MORE HELP

In their effort to sell to a larger proportion of store shoppers, deli directors are putting more fire under their "hot-priced" specials. A more generous supply of lighter fluid from their suppliers would be welcome.

Four out of five shoppers slip past the service deli without making a purchase during an average trip to their supermarket. A frustrating statistic for merchandisers who tirelessly bait their nets with the "irresistible" bait of "hot-priced" specials.

Sidestepping the debate over whether such specials achieve much more than vandalizing the service-and-quality image of the service deli establishment, let's take a look at the realities of the situation.

Which product classes are getting the most specials to promote them? What quality product is being offered? How is the margin structure altered? In what areas of promotion is more assistance being sought from suppliers? And, by the way, how do deli directors rate the quality of the help they do get from their suppliers?

(NOTE: The research in this article, carried out as part of the "Fourth Annual Operations Review" of INSTORE BUSINESS, reported in the April 1986 issue, was carried out at the request of the International Dairy-Deli Association. The results will be presented by Jeffrey A. Schaeffer, publisher of INSTORE BUSINESS, to IDDA's 22nd Annual Seminar & Exposition in Las Vegas this month.)

Cutting a deal

Fueled by supplier deals and allowances, service delis offer an average of 8.6 price specials a week (see Chart), with sliced meats (3.5), cheeses (2.2) and salads (1.5) dominating the action.

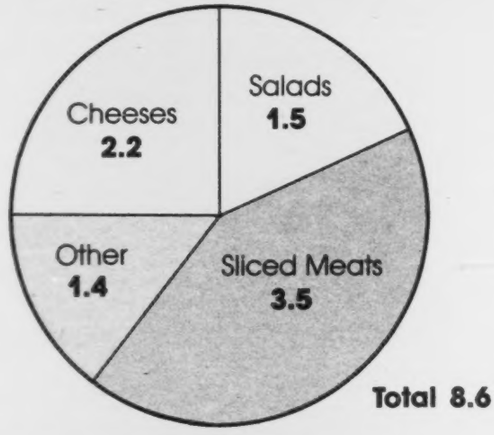
Merchandisers characterize their specials as either "in-ad features," which command a 35.0 percent margin—compared to the 40.0 percent overall departmental average—or as "hot-priced specials," which ratchet the margin down to 28.0 percent, almost a third less than the average.

Cutting down margins, however, is rarely synonymous with cutting down quality. For five product classes, including three meats and two cheeses, virtually every "hot-priced"

WEEKLY PRICE SPECIAL PROMOTIONS

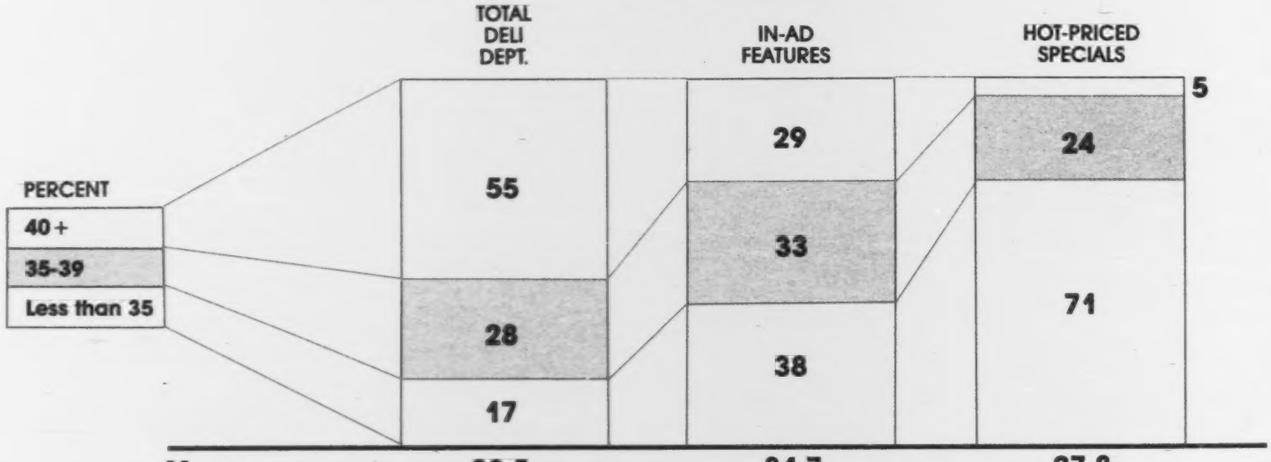
(Average Number of Price Specials Offered Each Week)

The average deli department offers 8.6 price specials a week, as seen in the chart at right, aggressive compared to the 4.8 for instore bakeries revealed in a similar study. In the chart below, while 55 percent of deli directors report their department's overall margin exceeds 40 percent, only 29 percent average that high a margin for their in-ad features, and a mere 5 percent see their margin for hot-priced specials at over 40 percent. Deli directors look to their suppliers for both more, and better quality, help with their instore demos, as seen in the bottom chart. Many feel that this is the single best method of recruiting "converts" for the service deli.



GROSS MARGINS DROP FOR FEATURES AND SPECIALS

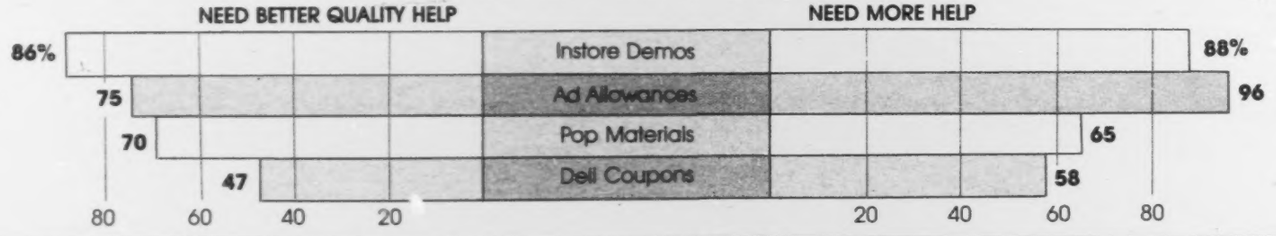
(% Deli Directors Reporting)



	TOTAL DELI DEPT.	IN-AD FEATURES	HOT-PRICED SPECIALS
Mean	38.5	34.7	27.8
Median	40.0	35.0	28.0

WHERE HELP IS NEEDED FROM SUPPLIERS

(% Deli Directors Reporting)



special was built around a regularly stocked brand rather than a short-term visitor. Nobody, it seems, wants to play Russian roulette with a quality image. "If we offered some cheap stuff at a low price," says the director of a midwest chain deli operation, "we'd sure sell a lot. But all the customers would remember later is *where* they bought the junk, not how much they saved. We can't afford that."

Respondents to the survey were asked whether the quality of brands featured in the "hot-priced" specials was top, high, medium or low. Not one admitted to featuring a brand of low quality, and only a handful use medium-quality brands (and then only for cheeses, never for meats). The single product classification where there is the most dedication to top quality is roast beef.

Help wanted

Once the special is authorized, deli directors feel, suppliers should expend more energy in assuring its success in the store. High priority is given to the importance of instore demos, with nine out of 10 looking for both more and better quality help. Also welcome (no surprise here) are juicier ad allowances.

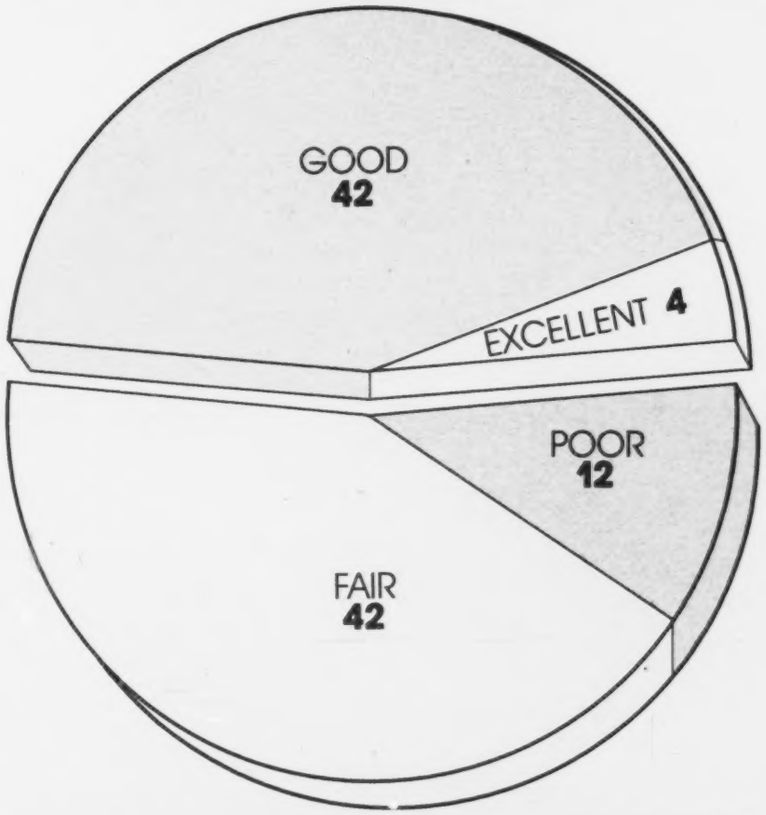
Continued on page 19A

RATING SUPPLIERS' HELP ON DELI ADVERTISING & PROMOTION

(% Deli Directors Reporting)

While, obviously, some individual suppliers would garner higher ratings (and others lower), the general attitude of deli directors is that there's plenty of room for their suppliers to shape up, as seen in the chart.

When choosing a brand for a "hot-priced" special, virtually everybody sticks with his regular brand, rather than bring in something new for a one-shot, as seen in the table below. Poor quality brands are never featured, and medium quality brands are only occasionally chosen for cheese specials, but never for meats.



ONLY QUALITY REGULAR BRANDS STAR AS "HOT-PRICED" SPECIALS

(% Deli Directors Reporting)

	Regular Brand Featured*	Quality of Featured Brand		
		Top	High	Medium
Meat				
Roast Beef	100%	87%	13%	—
Ham	100%	70	30	—
Bologna	96	65	35	—
Cheese				
American Cheese	100	74	17	9
Cheddar	91	70	26	4

Continued from page 16A

Point-of-purchase (POP) materials are also sought, but some suppliers claim that much of what they already supply ends up in the back room rather than out on the selling floor. Taking a global view of vendor-buyer relations, a deli merchandiser for a western chain comments, "We're looking for a complete program from our suppliers, and that means advertising, sampling, demos, detailed information on the products and video training for our employees."

Just how wide is the present gap between supplier programs and customer expectations is demonstrated by the report card suppliers receive. Only 4 percent rate the help they receive on deli advertising and promotion as *excellent*, with another 42 percent saying *good*. On the negative side (constituting a majority), 42 percent opt for *fair* and 12 percent vote for *poor*.

Tempting those other four out of five supermarket shoppers to stop and shop the service deli will obviously take a joint effort by deli management and their suppliers. Well-orchestrated programs for weekly price specials will be just one part, albeit an important one, of the solution. ■

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HEALTH & BEAUTY AIDS

COSMETICS (WOMEN) *Continued*

(BASE = WOMEN)	THREE TOP BRANDS (% of sales) #1	#2	#3	SHARE / CUM-	NO. OF BRANDS NEEDED TO REACH %-OF-SALES GOAL 50%	67%	75%	90%	ONE-BRAND USERS (% of Total Users)
Mascara	30.7	15.6	9.2	46.3 / 55.5	3	5	7	19	83.9
Nail Polish	19.1	14.0	11.8	33.1 / 44.9	4	6	8	15	96.1
Nail Polish Remover	67.7	15.2	4.7	82.9 / 87.6	1	1	2	4	93.7
Perfumes/Cologne	15.6	9.6	4.8	25.2 / 30.0	11	21	33	NR	50.0
Pressed Powder	14.1	12.1	10.7	26.2 / 36.9	6	10	12	21	88.7
AVERAGE	**22.9**	**11.9**	**8.9**	**34.8 / 43.7**					**80.4**

In the case of nail polish removers, pleasing users is relatively easy, with only two brands needed to account for 82.9 percent of sales. For polishes—where each brand includes a spectrum of hues—however, it takes eight brands just to satisfy a 75-percent-of-sales goal, and 15 to achieve the 90 percent level. Lipsticks present a similar problem, as do blushers.

HAIR CARE (WOMEN)

(BASE = WOMEN)	THREE TOP BRANDS (% of sales) #1	#2	#3	SHARE / CUM-	NO. OF BRANDS NEEDED TO REACH %-OF-SALES GOAL 50%	67%	75%	90%	ONE-BRAND USERS (% of Total Users)
Depilatories	22.7	21.7	5.6	44.4 / 50.0	3	NR	NR	NR	93.5
Hair Coloring	15.6	14.6	12.7	30.2 / 42.9	4	8	11	NR	86.5
Hair Conditioning Products	10.3	8.3	7.1	18.6 / 25.7	9	16	NR	NR	79.2
Hair Setting Products	13.5	10.8	10.6	24.3 / 34.9	6	10	NR	NR	87.7
Hair Sprays	11.3	11.1	10.5	22.4 / 32.9	6	12	17	NR	81.2
Home Permanents	12.4	12.2	10.0	24.6 / 34.6	5	NR	NR	NR	94.2
Shampoo	8.2	5.7	4.9	13.9 / 18.8	14	23	37	NR	61.1
Hair Mousse	24.4	19.5	13.5	43.9 / 57.4	3	4	5	NR	89.2
AVERAGE	**14.8**	**13.0**	**9.4**	**27.8 / 37.2**					**84.1**

Buyers who want to wash the how-many-brands-of-shampoo-should-we-stock problem out of their hair deserve indulgence for their frustration. With no single brand commanding a double-digit share of sales, 37 brands must be stacked up to equal 75 percent of sales. Letting some of the air out of this problem, however, is the evident low brand loyalty incited by shampoo, with four out of 10 users confessing multi brand purchases, presumably in response to coupons, price specials and other inducements to try new or established brands. By contrast, loyalty to colorings is high.

HBA MISC. (WOMEN)

(BASE = WOMEN)	THREE TOP BRANDS (% of sales) #1	#2	#3	SHARE / CUM-	NO. OF BRANDS NEEDED TO REACH %-OF-SALES GOAL 50%	67%	75%	90%	ONE-BRAND USERS (% of Total Users)
Bath/Shower Additives	19.4	12.3	7.1	31.7 / 38.8	5	NR	NR	NR	48.3
Body, Hand, Creams, Lotions, Oils	16.4	9.5	8.6	25.9 / 34.5	7	13	17	NR	56.3
Deodorant, Antiperspirant	10.6	6.8	6.2	17.4 / 23.6	10	17	22	38	70.4
Fem. Hyg. Deod. Sprays	43.7	18.7	15.4	62.4 / 77.8	2	3	3	5	90.2
Fem. Hyg. Douches/Suppositories	48.8	26.0	7.7	74.8 / 82.5	2	2	3	NR	86.2
Medicated Skin Ointment	24.9	13.0	11.4	37.9 / 49.3	4	5	NR	NR	86.2
Pre-Menstrual Pain Remedies	32.9	26.5	8.8	59.4 / 68.2	2	3	5	NR	44.4
Pregnancy Stretch Cream	36.4	24.0	—	60.4 / —	2	NR	NR	NR	98.8
Razor Blades	22.3	19.6	14.2	41.9 / 56.1	3	6	9	20	92.7
Sanitary Napkins	16.0	14.3	9.7	30.3 / 40.0	5	8	10	15	59.5
Shaving Cream, Gel	18.7	14.9	14.4	33.6 / 48.0	4	5	8	23	87.7
Tampons	58.9	24.4	11.6	83.3 / 94.9	1	2	2	3	86.5
AVERAGE	**29.1**	**17.5**	**9.6**	**46.6 / 56.2**					**75.6**

This potpourri of product categories includes several found in the feminine/hygiene section. Both the deodorant sprays and douches/suppositories feature strong #1 brand leaders, with over 40 percent of sales, and aggressive #2 and #3 brands, which join to bring top three brand share to around the 80 percent level, fortuitous in the perspective of the strong brand loyalty in this sector.

Following the same track, tampons exhibits both strong brand loyalty and brand leadership (#1 delivers 58.9 percent). But sanitary napkins is almost the reverse, with many brands fighting for small shares for a seemingly fickle constituency, where four out of 10 buy more than one brand.

NR—Not Reported Source: Mediamark Research Inc.

BRAND SHARE OF CATEGORY

HEALTH & BEAUTY AIDS

FIRST AID/SKIN CARE

(BASE = ADULTS)	THREE TOP BRANDS (% of sales) #1	#2	#3	NO. OF BRANDS NEEDED TO REACH %-OF-SALES GOAL 50%	67%	75%	90%	ONE-BRAND USERS (% of Total Users)
	SHARE	CUM-						
Adhesive Bandages	36.3	17.6 / 53.9	11.1 / 65.0	2	4	5	8	80.1
Athlete's Foot Remedies	38.3	15.0 / 53.3	10.0 / 63.3	2	4	5	9	85.1
Corn & Wart Removers	44.1	40.2 / 84.3	—	2	2	2	NR	94.5
Cotton Swabs*	67.3	22.5 / 89.8	—	1	1	2	NR	88.6
Sunburn Remedies	39.6	25.8 / 65.4	6.4 / 71.8	2	3	4	NR	89.5
Sunscreen/Suntan Products	19.1	14.4 / 33.5	9.9 / 43.4	5	8	11	NR	72.8
Talcum Powder	36.9	16.4 / 53.3	16.2 / 69.5	2	3	5	NR	82.2
AVERAGE	**40.2**	**21.7 / 61.9**	**7.7 / 69.6**					**84.7**

The average share of sales represented by the #1 brand (40.2 percent) is higher for first aid skin care than for any other HBA category. Cotton swabs (often given an on-shelf position in baby care) leads the pack in this regard. The most brand diffusion is found in sunscreen/suntan products, where 11 brands share the top three quarters of sales volume. As consumers seem willing to spend their sun product purchases over two or more brands, however, limited but selective brand stocking may carry the day.

*(BASE = FEMALE HOMEMAKERS)

ORAL HBA

(BASE = ADULTS)	THREE TOP BRANDS (% of sales) #1	#2	#3	NO. OF BRANDS NEEDED TO REACH %-OF-SALES GOAL 50%	67%	75%	90%	ONE-BRAND USERS (% of Total Users)
	SHARE	CUM-						
Denture adhesive	20.2	19.8 / 40.0	9.0 / 49.0	4	6	7	NR	89.9
Denture Cleaners	45.4	22.2 / 67.6	15.3 / 82.9	2	2	3	5	89.1
Dental Floss	76.1	5.3 / 81.4	3.2 / 84.6	1	1	1	NR	96.0
Dental Rinse	40.1	37.6 / 77.7	—	2	2	2	NR	94.2
Mouthwash	29.1	24.9 / 54.0	11.2 / 65.2	2	4	5	8	82.0
Toothache, Gum & Canker Remedies	33.8	27.4 / 61.2	21.0 / 82.2	2	3	3	6	86.2
Toothbrushes	23.8	17.2 / 41.0	13.9 / 54.9	3	7	NR	NR	82.6
Toothpaste	20.1	15.4 / 35.5	9.7 / 45.2	4	6	8	13	73.6
AVERAGE	**36.1**	**21.2 / 57.3**	**10.4 / 67.7**					**86.7**

When HBA shoppers put their money where their mouths are, they tend to repeat their usual brand purchase pattern. One-brand usage falls below 80 percent only for toothpaste, which may be explained by buying to satisfy the varying preferences of different members of the household. Denture users are very brand loyal, with more brands of adhesives than cleaners needed to keep them satisfied. The strongest brand franchise is exhibited by dental floss, where #1 commands 76.1 percent of volume.

REMEDIES/MISC. HBA

(BASE = ADULTS)	THREE TOP BRANDS (% of sales) #1	#2	#3	NO. OF BRANDS NEEDED TO REACH %-OF-SALES GOAL 50%	67%	75%	90%	ONE-BRAND USERS (% of Total Users)
	SHARE	CUM-						
Asthma Relief Remedies	37.8	25.0 / 62.8	15.9 / 78.7	2	3	3	NR	95.5
Cold/Sinus/Allergy Remedies	13.0	9.0 / 22.0	5.1 / 27.1	8	14	18	33	64.7
Cough Syrup	34.8	14.7 / 49.5	12.1 / 61.6	3	4	5	10	80.5
Diarrhea Remedies	55.3	30.6 / 85.9	4.7 / 90.6	1	2	2	3	89.6
Diet Pills	64.8	12.1 / 76.9	4.5 / 81.4	1	2	2	6	90.1
Eye Drops & Wash	39.3	14.2 / 53.5	6.2 / 59.7	2	5	7	NR	88.0
Groin Irritation Remedies	23.4	23.3 / 46.7	17.2 / 63.9	3	4	5	NR	94.7
Headache Remedies/Pain Relievers	20.0	11.1 / 31.1	7.2 / 38.3	6	11	15	31	63.1
Hemorrhoid Remedies	59.9	13.5 / 73.4	8.0 / 81.4	1	2	3	5	90.3
Indigestion Aids/Upset Stomach Remedies	16.3	13.1 / 29.4	9.4 / 38.8	5	7	8	15	73.3

When sufferers of ailments believe they've finally found the right elixir, they tend to remain loyal to it, as evidenced by the nine out of 10 users who report they've used only one brand of several of these remedies. These include asthma relief remedies, hemorrhoid and diarrhea remedies, and nasal sprays, all of which show strong leadership by their three most popular brands.

NR—Not Reported
Source: Mediamark Research Inc.

BRAND SHARE OF CATEGORY

HEALTH & BEAUTY AIDS

REMEDIES/MISC. HBA
Continued

(BASE = ADULTS)	THREE TOP BRANDS (% of sales) #1	#2 SHARE	#3 CUM-	NO. OF BRANDS NEEDED TO REACH %-OF-SALES GOAL 50%	67%	75%	90%	ONE-BRAND USERS (% of Total Users)
Laxatives	33.2	12.8 / 46.0	10.0 / 56.0	3	5	8	NR	86.2
Nasal Spray	27.9	17.3 / 45.2	15.4 / 60.6	3	4	5	NR	90.4
Pain Relieving Rubs/Liquids	39.9	14.3 / 54.2	12.5 / 66.7	2	4	4	NR	83.8
Sleeping Tablets	24.1	22.3 / 46.4	22.2 / 68.6	3	3	4	NR	94.7
Throat Remedies, Medicated	29.7	19.2 / 48.9	18.8 / 67.7	3	3	4	NR	71.9
Vitamins/Tablets, Capsules, Liquids	8.4	6.8 / 15.2	3.5 / 18.7	NR	NR	NR	NR	90.5
AVERAGE	**33.0**	**16.2 / 49.2**	**10.8 / 60.0**					**84.2**

In the case of vitamins, however, allegiance is spread over dozens of brands with tiny, albeit loyal, constituencies—posing a challenge to HBA buyers who want to satisfy as many shoppers as possible. The two classes of remedies where multi-brand purchase is most rampant are cold/sinus/allergy, and headache/pain, as users treat themselves with several varieties of remedies within the major classification.

HAIR CARE (MEN)

(BASE = MEN)	THREE TOP BRANDS (% of sales) #1	#2 SHARE	#3 CUM-	NO. OF BRANDS NEEDED TO REACH %-OF-SALES GOAL 50%	67%	75%	90%	ONE-BRAND USERS (% of Total Users)
Hair Coloring Products	25.1	12.3 / 37.4	5.4 / 42.8	5	10	13	NR	89.7
Hair Conditioning Products	9.4	8.9 / 18.3	6.9 / 25.2	8	13	22	NR	86.5
Hair Sprays	9.0	6.0 / 15.0	6.0 / 21.0	10	17	24	NR	86.5
Hair Tonic/Dressings	19.3	12.3 / 31.6	10.9 / 42.5	4	6	9	16	91.8
Shampoo	17.2	5.5 / 22.7	4.2 / 26.9	10	19	28	NR	70.0
AVERAGE	**16.0**	**9.0 / 25.0**	**6.7 / 31.7**					**84.9**

The average share grabbed by the top three brands is smaller here (31.7 percent) than for any of the 36 breakouts in this report. Men manage their manes from a selection of dozens of hair sprays, shampoos and conditioners. With the exception of shampoos, they tend to stay with the brand that works for them rather than to experiment with others.

SKIN CARE/SHAVING (MEN)

(BASE = MEN)	THREE TOP BRANDS (% of sales) #1	#2 SHARE	#3 CUM-	NO. OF BRANDS NEEDED TO REACH %-OF-SALES GOAL 50%	67%	75%	90%	ONE-BRAND USERS (% of Total Users)
Aftershave Lotion & Cologne	16.9	9.3 / 26.2	8.4 / 34.6	5	9	11	32	66.4
Complexion Care Products	21.1	6.9 / 28.0	6.6 / 34.6	7	14	21	NR	73.1
Deodorants/Antiperspirants	17.0	9.5 / 26.5	8.9 / 35.4	6	13	17	35	74.0
Disposable Razors	42.0	30.4 / 72.4	12.0 / 84.4	2	2	3	4	85.1
Hand/Body Creams/Lotions/Oils	22.2	7.2 / 29.4	5.2 / 34.6	7	13	17	NR	70.2
Medicated Skin Ointments	22.9	17.7 / 40.6	14.2 / 54.8	3	7	NR	NR	88.8
Pre-Electric Shave Lotion	43.2	29.9 / 73.1	17.7 / 90.8	2	2	3	3	96.5
Razor Blades	28.5	26.0 / 54.5	6.0 / 60.5	2	5	8	19	90.4
Shaving Creams or Gels	18.3	14.5 / 32.8	11.3 / 44.1	4	6	8	17	87.0
AVERAGE	**25.8**	**16.8 / 42.6**	**10.0 / 52.6**					**81.3**
AVERAGE—ALL CATEGORIES	**34.7**	**16.6 / 51.3**	**9.9 / 61.2**					**76.4**

In the matter of brand choice, habit rules the daily ritual of shaving. Only one man in 10 reports usage of more than one brand of razor blades, shaving creams or gels, or pre-electric shave lotion. Stocking the pre-shave he's looking for is no problem, with only three brands needed to satisfy 90 percent of sales. But the varieties of blades and creams needed to achieve that level peak at 19 and 17, respectively, posing more of a challenge to HBA buyers.

NR—Not Reported Source: Mediamark Research Inc.

SAMI UPDATE

HBA Food Store Sales Run About Even With 1985

Sales weren't spectacular in March—due to slumps in a number of key categories. Many new products did not expand their categories, but cannibalized brands within them.

BY ALAN MILLER JR.

During the 28 days ending March 28, 1986, total unit food store volume in 50 product categories tracked by SAMI fell 15,000 units behind the movement during the corresponding period a year ago.

Since the 1985 March figure was, in turn, half a percent below the 1984 level, it must be acknowledged that sales inertia appears to have set in among these products which, for the moment, have lost their upward mobility.

It is small consolation to manufacturers of toiletries and proprietary remedies to learn that frozen foods are also passing through the doldrums of late. Even the fanfare surrounding the Frozen Food Festival month failed to achieve a tonnage increase in March, although their loss rate was reduced from -2.4 percent in February to -0.8 percent in March.

One of the suggested factors that appears to be holding back growth of health and beauty aids is the observation that, except perhaps in the hair setting needs and appetite suppressant categories, new products have not been successful thus far in 1986 in expanding sales in their categories.

Successfully launched brands appear to be cannibalizing established brands rather than attracting additional sales in the product category. An example of this problem is found in the toothpaste and powder category, where even the combination of the pump dispensers and anti-plaque/tartar brands and line extensions have not created additional sales. March sales of these dentrifices were 9.1 percent behind their level in the period a year ago.

An even split

On a product group measurement basis, there was an even split in gains/losses, as was true in the preceding period, but this time the losses were slightly more pronounced than the sum of the gains. The best rates of product group gain were 3 percent improvements among deodorants and proprietary remedies. Losses of more than 5 percent among oral hygiene products and shaving needs were seen.

There were 22 categories with gains for the four weeks, and 28 with losses. This is the same ratio as was found during the preceding period. Three out of four of the categories in the baby needs categories were in the loss column, and the overall decline of 1.9 percent was identical to the loss rate found in the February period. Furthermore, the 1986 decline was on top of a reversal amounting to 3.5 percent in March 1985 vis–à–vis the same month in '84.

The only category to show gains in all three reporting intervals was nursing supplies, in which the most recent reading is a scant 1.2 percent improvement, which compared with plus 5.1 percent on an annual basis.

Half of the deodorant categories had unit volume losses, paced by a drop of 11.1 percent among creams and 6.3 percent in the case of feminine douches. However, the 13.0 percent four-week gain for sticks translates to 1 million units, more than enough to erase the loss situations.

The highest percentage gain was 17.1 percent, resulting from sales contributions attributed to new Shower to Shower line extensions. Also recording gains were feminine hygiene deodorants, foot deodorants and athlete's foot remedies. The loss of 1.6 percent in the spray deodorant category can be blamed on the failure of body sprays to maintain customer loyalty.

First aid down

Neither category of first aids was successful in surpassing sales in the similar 1985 period, but at least both first aid antiseptics and first aid bandages, cotton, gauze, etc., were coming off strong performances last year. The March 1986 loss rate amounted to 5.7 percent for first aid antiseptics and 1.9 percent for other first aid products.

The gain for all seven hair care needs categories combined amounted to nearly 1 million units, or 2.1 percent, but the rate of increase lagged behind the 3.6 percent improvement during February. Hair sprays continue to exhibit double-digit growth, with a current spurt of 14.2 percent, higher than the 14.0 percent hike on a 12-week basis, but lower than the 20.2 percent gain accomplished in February.

New brands of hair mousse products not offered in the 1985 period include Revlon, Finesse, Jhirmack and Perma Soft, and the growth rate during March was a hefty 29.7, higher than the 24.3 percent jump in the preceding period. There were losses of 2.1 percent and 4.6 percent in the high-volume shampoo and hair conditioning rinse categories respectively, and

HEALTH & BEAUTY AIDS: SAMI FOUR-WEEK FOOD STORE UNIT TRENDS VS. YEAR AGO

PRODUCT GROUP AND CATEGORY	% CHANGE VS. YEAR AGO		
	4 WEEKS ENDING 1/31/86	4 WEEKS ENDING 2/28/86	4 WEEKS ENDING 3/28/86
BABY NEEDS	**– 0.8%**	**– 1.9%**	**– 1.9%**
Baby Powders	– 9.9	+ 1.5	– 3.7
Baby Oils, Creams & Lotions	– 1.1	– 5.6	– 0.9
Infant Clothes	– 10.0	– 10.7	– 12.8
Nursing Supplies	+ 6.9	+ 3.7	– 1.2
DEODORANTS	**+ 0.9%**	**+ 1.2%**	**+ 3.1**
Sprays	– 4.8	– 2.2	– 1.6
Roll-Ons	– 4.0	– 8.1	– 1.4
Stick Deodorants & Pads	+ 8.8	+ 9.9	+ 13.0
Creams	– 16.5	– 17.5	– 11.1
Deodorants & Talcum Powders	+ 1.8	+ 14.9	+ 17.1
Feminine Hygiene Deodorants	+ 1.3	– 1.4	+ 4.4
Foot Deodorants & Athlete's Foot Remedies	+ 11.7	+ 7.1	+ 4.9
Feminine Douches	+ 1.7	+ 3.0	– 6.3
FIRST AID	**– 1.2%**	**+ 1.8%**	**– 2.7%**
Antiseptics	+ 2.1	– 1.7	– 5.7
First Aid Products	– 2.0	+ 2.7	– 1.9
HAIR CARE NEEDS	**+ 3.4%**	**+ 3.6%**	**+ 2.1%**
Shampoos	– 0.9	– 1.9	– 2.1
Hair Sprays	+ 8.1	+ 20.2	+ 14.2
Hair Conditioning Rinses	+ 1.2	– 2.9	– 4.6
Hair Setting Needs	+ 44.1	+ 24.3	+ 29.7
Home Permanent Kits	– 15.8	– 18.7	– 12.9
Hair Coloring	– 2.8	– 2.9	– 7.2
Hair Dressing Needs	+ 7.4	+ 7.8	+ 2.5
ORAL HYGIENE	**– 0.3%**	**+ 2.0%**	**– 6.2%**
Toothpastes & Powders	+ 0.8	+ 0.8	– 9.1
Mouthwashes	– 5.4	+ 7.7	+ 6.2
Breath Fresheners	– 4.8	– 8.8	– 11.9
Denture Cleaners	– 2.0	– 0.2	– 5.2
Denture Adhesives	– 4.8	– 3.4	– 6.4
Toothbrushes	+ 3.6	+ 3.4	– 7.5
PROPRIETARY REMEDIES	**– 2.7%**	**– 0.5%**	**+ 3.3%**
Antacids	+ 5.8	+ 5.9	+ 2.6
Internal Analgesics	– 2.9	– 0.3	+ 9.3
External Analgesics	– 0.8	+ 0.9	– 3.0
Cold Tablets	– 3.4	– 2.5	+ 0.1
Nasal Sprays—Drops—Inhalers	– 6.2	– 10.5	– 7.2
Chest Rubs	– 7.7	– 6.4	+ 3.2
Cough Remedies	– 10.3	– 4.0	+ 0.5
Laxatives	– 5.9	– 6.8	– 4.4
Sleeping Aids	+ 11.2	+ 5.5	+ 4.1
Tranquilizers	– 14.9	– 10.4	– 10.5
Synthetic Vitamins	– 0.9	– 0.3	+ 3.4
Eye Care Products	+ 19.2	+ 10.1	+ 5.3
Appetite Suppressants	+ 16.9	+ 15.6	+ 17.1
SHAVING NEEDS	**+ 5.5%**	**– 0.2%**	**– 5.5%**
Shaving Creams	+ 9.7	+ 10.0	+ 4.2
Pre-Shave Lotions	– 3.3	+ 4.0	– 7.0
After-Shave Lotions	– 1.8	– 2.9	– 2.7
Razor Blades	+ 4.8	– 3.6	– 9.3
Razors & Blades	+ 1.0	– 12.6	– 7.0
SKIN CARE AIDS	**+ 8.5%**	**– 1.3%**	**+ 2.2%**
Hand & Body Creams & Lotions	+ 9.7	– 3.3	+ 1.0
Facial Preparations	+ 9.0	– 4.6	– 3.4
Lip Care Products	+ 17.0	+ 11.3	+ 26.9
Suntan Lotions & Oils	+ 102.5	+ 2.2	+ 4.0
Cosmetic & Medicated Skin Aids	– 6.3	– 5.4	– 7.0
TOTAL ALL CATEGORIES	**+ 0.4%**	**+ 0.9%**	**± 0 %**

these two groups now show declines for all of 1986 through March.

Sales fall-offs among home permanent kits (-12.9 percent) and hair coloring (-7.2 percent) do not translate to a large number of units because both categories have a relatively low volume base. Sales of hair dressing needs advanced 2.5 percent, attributable in part to gains among ethnic hair preparations—the introduction of Vidal Sassoon hair grooms, including a mousse for men, and an upsurge in the Brylcreem line as a result of new line extensions, including mousse items for men.

Once again, the only oral hygiene category able to top last year's sales level was mouthwash, where the 6.2 percent jump was on top of a 2.5 percent increase in the period a year ago over 1984, but trailed behind the 7.7 percent run-up in volume registered in February.

Overall, the 6.2 percent decline in the oral hygiene product group amounted to more than three million units, most of which were found in the toothpaste and powder category, where important gains for the Crest brand were at the expense of its leading rivals. The losses found among breath fresheners (-11.9 percent), denture cleaners (-5.2 percent) and denture adhesives (-6.4 percent) represent continuing weakness for these categories, which now show loss rates for both the 12- and 52-week intervals.

Analgesics are up

One of the reasons for the turn-around among proprietary remedies can be traced to a dramatic upturn, amounting to 9.3 percent, in the high volume internal analgesics category. It seems logical to assume that consumers may have tossed out their capsules in the wake of the latest Tylenol poisoning incidents, and replenished their supplies with alternative remedies.

Three out of the four cold remedy categories enjoyed improved sales over last year's depressed levels, but the rates of gain were modest, amounting to less than 1 percent in the case of cold tablets and cough remedies. The 3.2 percent gain for chest rubs is on a small-volume base. The cold remedy category, with a long record of consecutive declines, is nasal sprays/drops/inhalers.

Fiber moves

In the March reporting period, the loss rate amounted to 7.2 percent, slightly better than the 10.5 percent drop in February. The strong performance of Schering's Fibre Trim was a major factor behind the 7.1 percent gain among appetite suppressants, which still show a loss of 4.4 percent on an annual basis.

These items, which had been losing volume to other weight-reduction regimens, improved their position over a weak 1985 period. Synthetic vitamins (+3.4 percent) reversed a decline rate in the preceding period, while sales of external analgesics moved from a February gain of 0.9 percent to a March loss of 3.0 percent.

It would appear that the eye care products category is finally reaching a point of maturity after enjoying sustained growth, resulting in a string of double-digit sales increases. The most recent four-week gain was 5.3 percent, which compares with +11.4 percent for the 12-weeks and +20.7 percent on an annual basis. As was true in February, sales declined for laxatives and stool softeners, but moved upward in the sleeping aids category.

The national launch of the Gillette Microtrac razor was not enough to arrest the precipitous decline in the razor blades category, where the current loss rate amounted to 9.3 percent. The only category of shaving needs with increased unit volume was shaving creams, where Colgate and Edge are the star performers among the established brands, and Soft Shave and Brush Plus have been providing sales among the newer brands. There were declines among pre-shave lotions(-7.0 percent), after shave lotions (-2.7 percent) and razor sets (-7.0 percent).

Skin care needs as a product group moved back into the plus column after having experienced sales weakness in February. There were gains of 26.9 percent for lip care products, 4.0 percent for suntan lotion/suntan oil, and 1.0 percent for hand & body creams and lotions.

The losses were found among facial preparations (-3.4 percent), and cosmetic & medicated skin aids (-7.0 percent), where new product activity has been lagging of late. On a 52-week basis, all of the five categories in this product group show gains.

March sales in a number of key categories have caused lethargy in overall health and beauty volume. Let's hope that the news is more cheerful when we review the picture as of April. ■

NOTE

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